

# Social Protection Committee Indicators Sub-group

Portfolio of EU Social Indicators  
for the Monitoring of Progress  
Towards the EU Objectives for Social  
Protection and Social Inclusion



2015 Update



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**PORTFOLIO OF EU SOCIAL INDICATORS FOR THE MONITORING  
OF PROGRESS TOWARDS THE EU OBJECTIVES FOR SOCIAL  
PROTECTION AND SOCIAL INCLUSION**

**2015 UPDATE**

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# 1. THE MONITORING FRAMEWORK

Since 2001, the Social Protection Committee and its Indicators Sub-Group (see below), have been developing indicators in the fields of social protection (pensions, healthcare and long-term care) and social inclusion. The list of EU social indicators is continuously being improved as statistics, data collection and policy needs evolve.

This section starts with a brief presentation of the policy framework in the context of which these indicators are used, namely to monitor and assess progress towards the EU social objectives and in the implementation of the social dimension of the Europe 2020 strategy. It then presents the EU bodies in charge of developing these EU social indicators, the different ways in which these indicators are used at EU and national levels, and how they are made available on the Internet.

## 1.1. Policy framework

### *EU objectives for social protection and social inclusion*

A key purpose of these EU social indicators is to monitor progress towards a set of EU objectives for social protection and social inclusion which have been jointly agreed by EU Member States and the European Commission. The first objectives were agreed in 2001. They were limited to social inclusion and led to the adoption by EU Heads of State and Government of a first set of 18 EU social indicators in the fields of poverty and social exclusion (often referred to as the *Laeken indicators*, after the name of the Belgian city where they were adopted in December 2001). In 2001/2, these objectives were complemented with objectives on pensions; and in 2004, with objectives on healthcare and long-term care.

These commonly agreed EU objectives on social protection and social inclusion have slightly evolved over time and the ones which currently underpin EU cooperation in the social field were adopted by the EU Council of Ministers (i.e. Employment and Social Affairs Ministers in the Employment and Social Affairs Council (EPSCO)) <sup>(1)</sup>. They are as follows:

#### **The overarching objectives for social protection and social inclusion are to promote:**

- a) social cohesion, equality between men and women and equal opportunities for all through adequate, accessible, financially sustainable, adaptable and efficient social protection systems and social inclusion policies;
- b) effective and mutual interaction between the Europe 2020 objectives of smart, sustainable and inclusive growth, taking full account of the relevant social provisions of the Lisbon Treaty;
- c) good governance, transparency and the involvement of stakeholders in the design, implementation and monitoring of policy.

#### **The following objectives apply to the different strands of work:**

#### **Social inclusion: A decisive impact on the eradication of poverty and social exclusion by ensuring:**

- d) access for all to the resources, rights and services needed for participation in society, preventing and addressing exclusion, and fighting all forms of discrimination leading to exclusion;
- e) the active social inclusion of all, both by promoting participation in the labour market and by fighting poverty and exclusion;

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<sup>(1)</sup> See SPC opinion on "[Reinvigorating the social OMC in the context of the Europe 2020 Strategy](#)".

- f) that social inclusion policies are well-coordinated and involve all levels of government and relevant actors, including people experiencing poverty, that they are efficient and effective and mainstreamed into all relevant public policies, including economic, budgetary, education and training policies and structural fund (notably ESF) programmes.

***Adequate and sustainable pensions by ensuring:***

- g) adequate retirement incomes for all and access to pensions which allow people to maintain, to a reasonable degree, their living standard after retirement, in the spirit of solidarity and fairness between and within generations;
- h) the financial sustainability of public and private pension schemes, bearing in mind pressures on public finances and the ageing of populations, and in the context of the three pronged strategy for tackling the budgetary implications of ageing, notably by: supporting longer working lives and active ageing; by balancing contributions and benefits in an appropriate and socially fair manner; and by promoting the affordability and the security of funded and private schemes;
- i) that pension systems are transparent, well adapted to the needs and aspirations of women and men and the requirements of modern societies, demographic ageing and structural change; that people receive the information they need to plan their retirement and that reforms are conducted on the basis of the broadest possible consensus.

***Accessible, high-quality and sustainable healthcare and long-term care by ensuring:***

- j) access for all to adequate health and long-term care and that the need for care does not lead to poverty and financial dependency; and that inequities in access to care and in health outcomes are addressed;
- k) quality in health and long-term care and by adapting care, including developing preventive care, to the changing needs and preferences of society and individuals, notably by developing quality standards reflecting best international practice and by strengthening the responsibility of health professionals and of patients and care recipients;
- l) that adequate and high quality health and long-term care remains affordable and financially sustainable by promoting a rational use of resources, notably through appropriate incentives for users and providers, good governance and coordination between care systems and public and private institutions. Long-term sustainability and quality require the promotion of healthy and active life styles and good human resources for the care sector.

The overall architecture of the portfolio of EU social indicators presented in this document (see below) is identical to that of the EU objectives for social protection and social inclusion, with one portfolio covering the overarching objectives, one covering the social inclusion objectives, one covering the pensions objectives and one covering the healthcare and long-term care objectives.

The regular reporting by Member States covers policies and measures under these various EU social objectives, with a multiannual perspective. It is organised so as to ensure synergies with the Europe 2020 policy cycle (see below), the European Semester <sup>(2)</sup> and national reporting requirements. In the form of National Social Reports, Member States inform on strategies and progress achieved in the different social fields. Even though the analysis presented in these National Social Reports draws primarily on the portfolio of commonly agreed indicators and statistics, it can be supplemented with national indicators, highlighting national specificities in particular areas of social protection and social inclusion.

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<sup>(2)</sup> Introduced in June 2010, the European Semester is an EU-level policy co-ordination tool contributing towards the broader EU aims of strengthening economic governance and greater policy co-ordination. It provides a more integrated surveillance framework for the implementation of fiscal policies under the Stability and Growth Pact as well as the implementation of structural reforms through national reform programmes.

## ***The Europe 2020 strategy and the poverty and social exclusion target***

More recently, since June 2010, EU social indicators have gained further importance with the adoption by EU Member States' Heads of State and Government of a new EU strategy for “smart, sustainable and inclusive growth”, known as the [Europe 2020 strategy](#).

Concretely, the Union has set five ambitious objectives - on employment, innovation, education, social inclusion and climate/energy - to be reached by 2020. These include a target on fighting poverty and social exclusion, namely to reduce the population at risk of poverty or social exclusion by at least 20 million by 2020 (compared to the situation observed in 2010 <sup>(3)</sup>). This target is one of three integrated objectives (along with employment and education) which are intended to contribute to inclusive growth, defined as “building a cohesive society in which people are empowered to anticipate and manage change and consequently to actively participate in society and the economy”.

The population at risk of poverty or exclusion (AROPE) is estimated on the basis of a combination of three indicators – the at-risk-of-poverty rate, the severe material deprivation rate, and the share of people living in (quasi-)jobless (i.e. very low work intensity) households. It reflects the multiple facets of poverty and exclusion across Europe and extends the original concept of relative income poverty to cover some important non-monetary aspects of poverty and labour market exclusion. By recognising the multi-dimensional approach to fighting poverty and social exclusion, it allows to take account of the diversity of situations and priorities across the EU.

### **1.2. The Social Protection Committee and its Indicators Sub-group**

The [Social Protection Committee \(SPC\)](#) is an EU advisory policy committee for Employment and Social Affairs Ministers in the Employment and Social Affairs Council (EPSCO). Established by the [Treaty on the Functioning of the EU](#) (article 160), it monitors social conditions in the EU and the development of social protection policies in Member States, and promotes discussion and coordination of policy approaches among national governments and the Commission.

In 2001 the SPC established the [Indicators' Sub-Group \(ISG\) of the SPC](#) to support its activities, in particular by providing technical and analytical support, especially with regard to indicators. The role of the ISG is to develop and define [EU social indicators](#) to monitor member countries' progress towards the commonly agreed EU objectives for Social Protection and Social Inclusion, to carry out analytical work based on agreed indicators and develop analytical frameworks to support policy reviews conducted by the SPC, and to contribute to the improvement of social statistics at EU level, particularly through development of the [EU Statistics on Income and Living Conditions \(EU-SILC\)](#). The present portfolio document reflects the work of the ISG in establishing commonly agreed indicators for the monitoring of progress towards the EU objectives for Social Protection and Social Inclusion.

### **1.3. The use of EU social indicators**

The adequate use of commonly agreed indicators is essential to support the reporting by Member States (see above) and the production of the annual SPC report on the social situation in the EU. Each portfolio (overarching, social inclusion, pensions, and health) has been designed to cover, as well as possible in view of the comparative data available at EU level, all key dimensions encompassed in the common objectives with a reduced number of primary indicators. This is also meant to focus the presentation of the indicators on key sub-populations. Each of the four indicators portfolios therefore constitutes a commonly agreed condensed and comprehensive monitoring tool of a country's social situation with regards to the

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<sup>(3)</sup> The data supporting this target are those for the EU Statistics on Income and Living Conditions (EU-SILC). In 2010, the EU-SILC data that were available were those that had been collected in 2008.

corresponding common objectives. Member States are therefore expected to assess their situation using the primary level streamlined indicators. This assessment, supported by relevant national level information, should provide a powerful tool to identify priority objectives.

EU social indicators are used in various contexts:

- monitoring the [Europe 2020](#) target on [poverty and social exclusion](#)
- preparing the [European semester](#) (including the [National Reform Programmes](#) <sup>(4)</sup>) and providing evidence for assessing specific social challenges facing EU countries through the [Joint Assessment Framework](#)
- identifying the key social trends to watch across the EU through the [Social Protection Performance Monitor](#), a tool which uses a set of key EU social indicators for monitoring developments in the social situation in the European Union
- as part of EU countries' reporting on social policies in the National Reform Programmes, [National Social Reports](#) (in which Member States present their strategies and progress achieved towards the EU objectives for social protection and social inclusion), and country-specific/thematic reviews
- preparing the Social Protection Committee's annual report ("[SPC annual report on the social situation in the EU](#)") which assesses progress towards the EU objectives for social protection and social inclusion and the implementation of the social dimension of Europe 2020
- for thematic reports on relevant topics such as [Pensions adequacy in the EU](#) and [Child poverty and well-being](#). These thematic reports reflect the thematic work of the SPC and ISG, and other activities carried out under the SPC
- for EU-level analytical work in the field of social policy.

EU social indicators are also used in other kind of surveys and comparative studies (by policy makers, stakeholders, etc.), at a domestic or international level which is also important.

#### 1.4. Access to the EU social indicators

The figures for all commonly agreed indicators and context information are calculated and regularly updated by Eurostat on the basis of commonly agreed definitions/methodologies <sup>(5)</sup> and are made available via the Eurostat web-site on clearly identified and dedicated pages.

- The data for indicators related to the Europe 2020 poverty and social exclusion target are available on the following link: [Europe 2020 target](#)
- All EU indicators for social protection and social inclusion are available on a very clear and useful set of pages on the following Eurostat website: <http://ec.europa.eu/eurostat/web/employment-and-social-policy/social-protection-and-inclusion>, which covers each of the four sets of objectives ([Overarching indicators](#), [Social inclusion](#), [Pensions](#), and [Healthcare and long term care](#))

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<sup>(4)</sup> From the link page click on a country to access the National Reform Programme

<sup>(5)</sup> For details of SILC based indicator definitions and methodology, including whether the figures refer to the year of the survey (e.g. material deprivation items) or the year prior to the survey (e.g. income and work intensity), please consult the document "Working paper with the description of the 'Income and living conditions dataset'" at the following address: [http://ec.europa.eu/eurostat/documents/1012329/1012398/D5.1.3-Working\\_paper\\_final\\_20141204.pdf/c4ed99f5-7cc3-4bf9-a6eb-b1f730299e0e](http://ec.europa.eu/eurostat/documents/1012329/1012398/D5.1.3-Working_paper_final_20141204.pdf/c4ed99f5-7cc3-4bf9-a6eb-b1f730299e0e)

- Data for the list of EU indicators that were adopted by the SPC in the context of the work on investing in children as preparation of the 2013 EC Recommendation on child poverty ("[Investing in children: breaking the cycle of disadvantage](#)") can be found on the following link: [Investing in children](#).

## 2. GUIDING PRINCIPLES FOR THE SELECTION OF INDICATORS AND STATISTICS

The [Social Protection Committee](#) has agreed on a methodological framework for the development of the portfolio of EU social indicators <sup>(6)</sup>. Even though the priority is given to outcome indicators, the portfolio is not limited to these in order to reflect the action and impact of policies; and, as explained below, some flexibility is introduced as to how strictly the criteria are applied, notably allowing for the inclusion in the list of "commonly agreed national indicators" based on commonly agreed definitions and assumptions.

The selection of individual indicators should, in principle, be guided by the following minimum set of methodological criteria:

- a) An indicator should capture the essence of the problem and have a clear and accepted normative interpretation;
- b) An indicator should be robust and statistically validated;
- c) An indicator should provide a sufficient level of cross country comparability, as far as practicable with the use of internationally applied definitions and data collection standards;
- d) An indicator should be built on available underlying data, and be timely and susceptible to revision;
- e) An indicator should be responsive to policy interventions but not subject to manipulation.

Past experience in the development of EU social indicators by the SPC Indicators Sub-Group (ISG) has, however, shown that specific key information might be essential to capture one of the key dimensions of a commonly agreed policy objective (portfolio criteria a), while not fulfilling all criteria for the selection of indicators (e.g. comparability, normative value). In order to overcome this difficulty, the ISG has agreed to flag the indicators and statistics included in the EU portfolio of social indicators according to how they should be used. The following three categories (***EU, National and Context***) aim at highlighting to users the specific purpose and limitations of each indicator and statistics in the list:

- **Commonly agreed EU indicators** contribute to a comparative assessment of Member States' progress towards the common objectives on social protection and social inclusion. These indicators might refer to social outcomes, intermediate social outcomes or outputs.
- **Commonly agreed national indicators** are based on commonly agreed definitions and assumptions that provide key information to assess the progress of Member States in relation to certain objectives, while not allowing for a direct cross-country comparison, or not necessarily having a clear normative interpretation. These indicators are especially suited to measure the scale and nature of policy intervention. These indicators should be interpreted jointly with the relevant background information (exact definition, assumptions, representativeness).

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<sup>(6)</sup> The methodological framework was originally proposed by Atkinson et al in an independent academic study commissioned by the 2001 Belgian Presidency of the EU. The current framework is still consistent with the broad thrust of recommendations contained in this study, though differing in some details. Readers interested in a detailed discussion of these principles can refer to this study. (Atkinson et al (2002), *Social Indicators: The EU and Social Inclusion*, Oxford University Press, Oxford.)

- **Context information:** Each portfolio will have to be assessed in the light of key context information, and by referring to past, and where relevant, future trends. The list of context information is indicative and leaves room for other background information that would be most relevant to better frame and understand the national context.

On top of these criteria which apply to each individual indicator, each of the four portfolios of indicators (taken as a whole) should also meet certain criteria:

- Each portfolio should be comprehensive and cover all key dimensions of the common objectives;
- Each portfolio should be balanced across the different dimensions;
- Each portfolio should enable a synthetic and transparent assessment of a country's situation in relation to the common objectives.

Within each portfolio, for the sake of streamlining, a reduced number of primary EU and national indicators has been suggested as a condensed set of lead indicators which cover all essential dimensions of the defined objectives and/or highlight the social situation of key sub-populations; whereas secondary (EU and national) indicators would support these lead indicators by providing a greater insight into the nature of the problem. These primary and secondary indicators have to be assessed in the light of key context information and by referring to past, and where relevant, future trends.

### 3. OVERARCHING PORTFOLIO

The overarching EU objectives of Social Protection and Social Inclusion are to promote:

- social cohesion, equality between men and women and equal opportunities for all through adequate, accessible, financially sustainable, adaptable and efficient social protection systems and social inclusion policies;
- effective and mutual interaction between the Europe 2020 objectives of smart, sustainable and inclusive growth, taking full account of the relevant social provisions of the Lisbon Treaty;
- good governance, transparency and the involvement of stakeholders in the design, implementation and monitoring of policy.

On the basis of these objectives, the ISG has defined a reduced set of new or already agreed EU or national indicators to monitor each of these broad objectives.

The following methodological principles have been applied in the selection of overarching indicators:

- The portfolio should reflect fully the overarching objectives, including dimensions that are “overarching” (Social Protection expenditures, Labour Market participation rates) and not specific to a strand (social inclusion, pensions or health) in particular.
- The portfolio should include indicators reflecting the link between the main policy areas and ultimate social cohesion outcomes, this could be achieved through an adequate combination of indicators reflecting social outcomes (e.g. at-risk-poverty rates, other income and living conditions indicators, unemployment rates, educational attainment, etc.) and indicators reflecting the scale and nature of social policy interventions (e.g. social protection expenditures, etc.).
- The portfolio should reflect the main priorities of each strand in a balanced way.

### 3.1. Overarching portfolio

The table indicates for each indicator the key dimension covered, the “name” and definition of each indicator, whether it is considered a commonly agreed EU indicator (EU) or a commonly agreed national indicator (NAT), key breakdowns and the data source.

Data for the below indicators in the overarching portfolio can be accessed on the link [Overarching indicators](#) (including the more detailed breakdowns mentioned), or for overall figures using individual links in the table below. Data for the indicator related to the Europe 2020 poverty and social exclusion target and its components (highlighted in yellow in the table below) are also available on the link [Europe 2020 target](#).

| Code | Key dimension   | Commonly agreed indicator                                   | Type (EU indicator/<br>NAT – national indicator) | Definition   | Breakdowns  | Comments   | Data source        |
|------|---|---|--|--|---|--|--------------------|
| 1    | Europe 2020 headline indicator – AROPE<br><br>Risk of poverty or social exclusion | <a href="#">At risk of poverty or social exclusion rate</a> | EU   | Share of persons who are at-risk-of-poverty and/or severely materially deprived and/or living in (quasi-)jobless households (i.e. households with very low work intensity).<br><br>The AROPE indicator is based on the combination of the three indicators, i.e. it is based on the sum of those persons belonging to one or more of these categories. | Gender (for people above 18);<br><br>Age:<br>0-17 (0-5; 6-11; 12-17),<br>18-64, 65+ | Indicator used to assess progress towards the Europe 2020 target of a reduction in the population at risk of poverty or social exclusion by at least 20 million compared to the situation observed in 2010 (based on 2008 EU-SILC data). | Eurostat – EU-SILC |

| Code | Key dimension                                      | Commonly agreed indicator  | Type (EU indicator/ NAT – national indicator) | Definition   | Breakdowns  | Comments   | Data source        |
|------|--|--|---|--|---|--|--------------------|
| 1a   | (AROE Component)<br><br>Risk of poverty            | <a href="#">At-risk-of poverty rate</a><br><br>+ <a href="#">illustrative threshold values</a> | EU  | Share of persons aged 0+ with an equivalised disposable income below 60% of the national equivalised median income <sup>(7)</sup> .<br><br>Value of the at-risk-of-poverty threshold (60% median national equivalised income) in PPS for two illustrative household types (i.e. single person household and two-adult and two-child household) | Gender (for people above 18);<br><br>Age: 0-17 (0-5; 6-11; 12-17), 18-64, 65+ | For each country, the poverty risk indicator must be assessed by looking at both the share of people whose income is below the threshold and the comparative level (in PPS <sup>(8)</sup> ) of this threshold. | Eurostat – EU-SILC |
| 1b   | (AROE Component)<br><br>(Quasi-)jobless households | <a href="#">Population living in (quasi-)jobless households</a>                                | EU  | Share of people aged 0-59 living in (quasi-)jobless households (i.e. households with <a href="#">very low work intensity</a> <sup>(9)</sup> ), where on average working-age adults (aged 18-59) work 20% or less of their total work potential during the past year.   | Gender;<br><br>Age:<br>0-17 (0-5; 6-11; 12-17), 18-59                         |  | Eurostat – EU-SILC |

<sup>(7)</sup> **Equivalised median income** is defined as the household's total disposable income divided by its “equivalent size”, to take account of the size and composition of the household, and is attributed to each household member (including children). Equivalisation is made on the basis of the OECD modified scale (which assigns a value of 1 to the first adult, of 0.5 to each additional adult member (aged 14 and over) and of 0.3 to each child aged below 14).

<sup>(8)</sup> On the basis of Purchasing Power Parities, (PPP), Purchasing Power Standards (PPS) convert amounts expressed in a national currency to an artificial common currency that equalises the purchasing power of different national currencies (including those countries that share a common currency).

<sup>(9)</sup> Work intensity is the ratio between the number of months that household members of working age (persons aged 18-59 years, with the exclusion of dependent children aged 18-24) worked during the income reference year and the total number of months that could theoretically have been worked by the same household members. For persons who declared that they worked part-time, the number of months worked in full-time equivalent roles is estimated on the basis of the number of hours usually worked at the time of the interview.

| Code | Key dimension                                       | Commonly agreed indicator                        | Type (EU indicator/<br>NAT – national indicator) | Definition  | Breakdowns   | Comments | Data source  |
|------|---|--|--|---|--|----------|--|
| 1c   | (AROE Component)<br><br>Severe material deprivation | <a href="#">Severe material deprivation rate</a> | EU   | Share of population living in households lacking at least 4 items out of the following 9 items: i) to pay rent or utility bills, ii) to keep home adequately warm, iii) to face unexpected expenses, iv) to eat meat, fish or a protein equivalent every second day, v) to have a week's holiday away from home, or could not afford (if wanted to) vi) a car, vii) a washing machine, viii) a colour TV, or ix) a telephone. | Gender;<br>Age: 0-17 (0-5; 6-11; 12-17), 18-64, 65+  |          | Eurostat – EU-SILC   |
| 2    | Intensity of poverty risk                           | <a href="#">Relative median poverty risk gap</a> | EU   | Difference between the median equivalised income of persons aged 0+ below the at-risk-of poverty threshold and the threshold itself, expressed as a percentage of the at-risk-of poverty threshold.   | Gender (for people above 18);<br>Age: 0-17 (0-5; 6-11; 12-17), 18-64, 65+                              |          | Eurostat – EU-SILC   |
| 3    | Income inequalities                                 | <a href="#">Income quintile ratio (S80/S20)</a>  | EU   | Ratio of total income received by the 20% of the country's population with the highest income (top quintile) to that received by the 20% of the country's population with the lowest income (lowest quintile). Income must be understood as equivalised disposable income.  |  |          | Eurostat – EU-SILC   |
| 4    | Health inequalities                                 | Healthy life expectancy (e.g. at birth)          | NAT  | Number of years that a person at birth, at 45, and at 65 is still expected to live in a healthy condition (also called disability-free life expectancy).<br><br>To be interpreted jointly with life expectancy  | Gender (the indicator is available only for men and women separately);<br>age (at birth, at 45, at 65) |          | Eurostat – there are two components to the calculations - mortality statistics (Eurostat's demographic database) and data on self-perceived disability Eurostat – EU-SILC) |

| Code | Key dimension  | Commonly agreed indicator                                | Type (EU indicator/ NAT – national indicator) | Definition  | Breakdowns | Comments  | Data source        |
|------|--|--|---|---|------------|---|--------------------|
| 5    | <b>Educational outcome and human capital formation</b>       | <a href="#">Early school leavers</a>                     | EU  | Share of persons aged 18 to 24 who have only lower secondary education (their highest level of education or training attained is 0, 1 or 2 according to the 1997 International Standard Classification of Education – ISCED 97) and have not received education or training in the four weeks preceding the survey. | Gender     |   | Eurostat – LFS     |
| 6    | <b>Financial sustainability of social protection systems</b> | <b>Projected total public social expenditures</b>        | NAT   | Age-related projections of total public social expenditures (e.g. pensions, health care, long-term care, education and unemployment transfers), current level (% of GDP) and projected change in share of GDP (in percentage points) (2010-20-30-40-50)   |            | To be found in the regular <a href="#">Ageing Reports</a> | EPC/AWG            |
| 7a   | <b>Pension adequacy</b>                                      | <a href="#">Median relative income of elderly people</a> | EU  | Median equivalised income of people aged 65+ as a ratio of income of people aged 0-64   |            |   | Eurostat – EU-SILC |
| 7b   | <b>Pension adequacy</b>                                      | <a href="#">Aggregate replacement ratio</a>              | EU  | Median individual pension income of the 65-74 age group relative to median individual earnings of the 50-59 age group, excluding other social benefits <sup>(10)</sup>  | Gender     |   | Eurostat – EU-SILC |

<sup>(10)</sup> Pension income covers pensions from basic (first pillar) schemes, means-tested welfare schemes; early retirement widow's (first pillar) and other old age-related schemes. Other social benefits includes: unemployment-related benefits; family-related benefits; benefits relating to sickness or invalidity; education-related allowances; any other personal social benefits. Work income includes income from wage and salary employment and income from self-employment.

| Code | Key dimension   | Commonly agreed indicator   | Type (EU indicator/<br>NAT – national indicator) | Definition  | Breakdowns   | Comments   | Data source                  |
|------|---|---|--|---|--|--|------------------------------|
| 8    | Inequalities in access to health care   | <a href="#">Self-reported unmet need for medical care</a><br><br>Care utilisation         | NAT  | Total self-reported unmet need for medical care for the following three reasons: financial barriers + waiting times + too far to travel<br><br>To be analysed together with information on care utilisation (e.g. the number of visits to a doctor (GP or specialist) during the last 12 months)  | Gender,<br>Age <sup>(11)</sup><br>groups:<br>18-44;<br>45-54;<br>55-64; 65+;<br>75+; 18-64 |  | Eurostat – EU-SILC           |
| 9a   | Household income (aggregate for the household sector, providing a link between macro-economic developments and household income developments) | <a href="#">Growth rate in real gross household disposable income (GDHI (unadjusted))</a> | EU   | GDHI = Compensation of employees (received) + Gross operating surplus and gross mixed income (received) + Property income (received) - Property income (paid) + Other current transfers (received) - Other current transfers (paid) + Social benefits other than social transfers in kind (received) - Social benefits other than social transfers in kind (paid) + Social contributions (received) - Social contributions (paid) - Current taxes on income, wealth, etc. (paid)<br><br>Real GDHI is calculated as nominal GDHI divided by the deflator of household final consumption expenditure. | Evolution (growth rate) of the overall GDHI indicator as well as its components            | In national accounts terminology, “gross” refers to items calculated before the deduction of consumption of fixed capital and “net” refers to items calculated after this deduction<br><br>“Unadjusted” refers to the indicator not taking into account the different degrees of involvement of governments in the provision of free services (i.e. non-cash services in kind) to households | Eurostat – National accounts |

<sup>(11)</sup> Note that for the age breakdown of people aged 75 and more there may be some potential statistical difficulties due to the size of samples and non-coverage of collective households by household surveys.

| Code | Key dimension   | Commonly agreed indicator   | Type (EU indicator/<br>NAT – national indicator) | Definition   | Breakdowns  | Comments | Data source        |
|------|---|---|--|--|---|----------|--------------------|
| 9b   | Improved standards of living resulting from economic growth | <a href="#">At-risk-of-poverty rate anchored at a fixed moment in time (2008)</a><br><i>(Possibly replaced or supplemented in future)</i> | EU   | Share of persons aged 0+ with an equivalised disposable income below the at-risk-of-poverty threshold calculated in survey year 2008, up-rated by inflation over the years   | Age:<br>total, 0-17,<br>18-64, 65+<br>Gender (18+ only) |          | Eurostat – EU-SILC |
| 10   | Employment of older workers                                 | <a href="#">Employment rate of older workers</a>  | EU   | Persons in employment in age groups 55-59 and 60-64 as a proportion of total population in the same age group  | Age:<br>55-59; 60-64<br>Gender                          |          | Eurostat – LFS     |
| 11   | In-work poverty   | <a href="#">In-work at-risk-of-poverty rate</a>   | EU   | Individuals who are classified as employed <sup>(12)</sup> (distinguishing between “wage and salary employment plus self-employment” and “wage and salary employment” only) and who are at risk of poverty.<br><br>Indicator needs to be analysed according to personal, job and household characteristics, and also in comparison with the poverty risk faced by the unemployed and the inactive. | full-time/part-time                                     |          | Eurostat – EU-SILC |
| 12   | Participation in the labour market                          | <a href="#">Activity rate</a>   | EU   | Share of employed and unemployed people in the total population of working age 15-64   | Gender and age: 15-24, 25-54, 55-59; 60-64; Total       |          | Eurostat – LFS     |

<sup>(12)</sup> Individuals classified as employed according to the definition of most frequent activity status. The most frequent activity status is defined as the status that individuals declare to have occupied for more than half the number of months in the calendar year.

| Code | Key dimension     | Commonly agreed indicator   | Type (EU indicator/<br>NAT – national indicator) | Definition  | Breakdowns | Comments | Data source    |
|------|-------------------|---|--|---|------------|----------|----------------|
| 13   | Regional cohesion | <a href="#">Regional disparities – coefficient of variation of employment rates</a> | NAT  | <p>Standard deviation of regional employment rates divided by the weighted national average (age group 15-64 years). (NUTS II)</p> <p>The dispersion of employment rates (measured using the coefficient of variation) across NUTS level 2.</p> |            |          | Eurostat – LFS |

### 3.2. Context information

The overarching indicators will have to be assessed in the light of key context information and by referring to past, and where relevant, future trends. The list of context information is indicative and leaves room to other background information that would be most relevant to frame and understand better the national socio-economic context.

Figures for several of the below context information items can be accessed on the link [Overarching indicators](#) (including the more detailed breakdowns mentioned), or for overall figures using the individual links below.

- (1) [GDP growth](#)
- (2) [Employment rate](#), by sex  
[Unemployment rate](#), by sex, and key age groups  
[Long term unemployment rate](#), by sex and key age groups
- (3) [Life expectancy at birth and at 65](#)
- (4) *Old age dependency ratio*, current and projected
- (5) [Distribution of population by household types](#), including collective households
- (6) *Public debt*, current and projected, % of GDP
- (7) [Social protection expenditure](#), current, by function, gross and net (ESPROSS)
- (8) *Jobless households by main household types*
- (9) Making work pay indicators
  - [Unemployment trap](#): The percentage of gross earnings which is taxed away through higher tax and social security contributions and the withdrawal of unemployment and other benefits when an unemployed person returns to employment. Available only for single persons without children earning 67% of the average worker when in work. (Source: EC-OECD tax-benefit model)
  - *Inactivity trap* (esp. second earner case): The total increase in effective tax burden resulting from a transition from labour market inactivity to a full time low-wage job with and without childcare costs as % of gross earnings in new job. Breakdowns by household type (single without children, couple without children, lone parent with two children, two-earner couple with two children) and by wage level. (Source: EC-OECD tax-benefit model)
  - [Low-wage trap](#): The percentage of gross earnings which is taxed away through the combined effects of income taxes, social security contributions and any withdrawal of benefits when gross earnings increase from 33% to 67% of average wage. Breakdowns by household type (single person without children, one-earner couple with two children). (Source: EC-OECD tax-benefit model)
- (10) *Net income of social assistance recipients as a % of the at-risk of poverty threshold* for 3 jobless household types <sup>(13)</sup>

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<sup>(13)</sup> This indicator refers to the income of people living in households that only rely on “last resort” social assistance benefits (including related housing benefits) and for which no other income stream is available (from other social protection benefits – e.g. unemployment or disability schemes – or from work). The aim of such an indicator is to evaluate if the safety nets provided to those households most excluded from the labour market are sufficient to lift

- (11) [At-risk of poverty rate before social transfers](#) (other than pensions), 0-17, 18-64, 65+ <sup>(14)</sup>
- (12) *Change in projected theoretical replacement ratio (NAT)* <sup>(15)</sup> for base case 2004-2050 accompanied with information on type of pension scheme (DB, DC or NDC), and *change in projected public pension expenditure 2004-2050*. (These results should systematically be presented collectively in one table).  
+ assumptions and relevant background information on representativeness  
+ present also calculations of changes in replacement rates for one or two other cases, if suitable (for instance OECD)
- (13) [Total health expenditure per capita](#). Total health expenditure per capita in PPP (Eurostat - based on system of health accounts (SHA)).

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people out of poverty. This indicator is calculated on the basis of the tax-benefit models developed jointly by the OECD and the European Commission. It is only calculated for Countries where non-categorical social benefits are in place and for 3 jobless household types: single, lone parent, 2 children and couple with 2 children. This indicator is especially relevant when analysing MWP indicators.

<sup>(14)</sup> This indicator is meant to compare the observed risk of poverty with a hypothetical measure of a risk of poverty in absence of all social transfers (other than pensions) all things being kept equal. In particular, household and labour market structure are kept unchanged. This measure does not take into account other types of transfers that have an impact on household disposable income such as transfers in kind and tax rebates.

<sup>(15)</sup> Definition: Change in the theoretical level of income from pensions at the moment of take-up related to the income from work in the last year before retirement for a hypothetical worker (base case), percentage points, 2004-2050, with information on the type of pension scheme (DB, DC or NDC) and changes in the public pension expenditure as a share of GDP, 2004-2050. This information can only collectively form the indicator called projected theoretical replacement ratio. Results relate to current and projected, gross (public and private) and total net replacement rates, and should be accompanied by information on representativeness and assumptions (contribution rates and coverage rate, public and private). Specific assumptions agreed in the ISG. (Source: ISG and AWG)

## 4. SOCIAL INCLUSION PORTFOLIO

For the social inclusion strand the aim is to make “a decisive impact on the eradication of poverty and social exclusion” by ensuring:

- access for all to the resources, rights and services needed for participation in society, preventing and addressing exclusion, and fighting all forms of discrimination leading to exclusion;
- the active social inclusion of all, both by promoting participation in the labour market and by fighting poverty and exclusion;
- that social inclusion policies are well-coordinated and involve all levels of government and relevant actors, including people experiencing poverty, that they are efficient and effective and mainstreamed into all relevant public policies, including economic, budgetary, education and training policies and structural fund (notably ESF) programmes.

Distinction is made between primary and secondary indicators. Primary indicators are a restricted number of “lead indicators which cover the broad fields that have been considered the most important elements in leading to social exclusion”. They emphasise that in the context of the EU social inclusion process poverty and social exclusion is a concept that encompasses income, access to essential durables, education, health care, adequate housing, distance from the labour market. Secondary indicators support these lead indicators by describing in greater detail the nature of the problem or by describing other dimensions of the problem.

## 4.1. Social inclusion – Primary indicators

Data for the below indicators in this portfolio can be accessed on the link [Social inclusion](#) (including the more detailed breakdowns mentioned), or for overall figures using the individual links in the table below.

| Code                      | Commonly agreed indicator  | Type (EU indicator/<br>NAT – national indicator) | Definition  | Breakdowns   | Comments  | Data source        |
|---------------------------|--|--|---|--|---|--------------------|
| <b>PRIMARY INDICATORS</b> |  |  |   |  |   |                    |
| SI-P1                     | <a href="#">At-risk-of poverty rate</a><br>+ <a href="#">illustrative threshold values</a> | EU   | Share of persons aged 0+ with an equivalised disposable income below 60% of the national equivalised median income <sup>(16)</sup> .<br><br>Complemented by the value of the at-risk-of-poverty threshold (60% median national equivalised income) in PPS for two illustrative households: a single-person household and a household consisting of two adults and two children. | Gender (for people above 18)<br><br>Age: 0-17 (0-5; 6-11; 12-17), 18-64, 65+ | For each country, the poverty risk indicator must be assessed by looking at both the number of people whose income is below the threshold and the comparative level (in PPS) of this threshold. | Eurostat – EU-SILC |
| SI-P2                     | <a href="#">Persistent at-risk of poverty rate</a>   | EU   | Share of persons aged 0+ with an equivalised disposable income below the at-risk-of-poverty threshold in the current year and in at least two of the preceding three years.   | Gender (for people above 18)<br><br>Age: 0-17, 18-64, 65+                    |   | Eurostat – EU-SILC |
| SI-P3                     | <a href="#">Relative median poverty risk gap</a>   | EU   | Difference between the median equivalised income of persons aged 0+ below the at-risk-of poverty threshold and the threshold itself, expressed as a percentage of the at-risk-of poverty threshold.   | Gender (for people above 18)<br><br>Age: 0-17 (0-5; 6-11; 12-17), 18-64, 65+ |   | Eurostat – EU-SILC |

<sup>(16)</sup> **Equivalised median income** is defined as the household's total disposable income divided by its "equivalent size", to take account of the size and composition of the household, and is attributed to each household member (including children). Equivalisation is made on the basis of the OECD modified scale (which assigns a value of 1 to the first adult, of 0.5 to each additional adult member (aged 14 and over) and of 0.3 to each child aged below 14).

| Code                      | Commonly agreed indicator                                       | Type (EU indicator/<br>NAT – national indicator) | Definition   | Breakdowns                                     | Comments  | Data source        |
|---------------------------|---|--|--|--|---|--------------------|
| <b>PRIMARY INDICATORS</b> |   |  |  |  |   |                    |
| SI-P4                     | <a href="#">Long term unemployment rate</a>                     | EU   | Total long-term unemployed population (≥12 months' unemployment; ILO definition) as a proportion of total active population aged 15 years or more.   | Gender   | The long term unemployment rate needs to be interpreted in the light of information on the activity/inactivity rate of the population.  | Eurostat – LFS     |
| SI-P5                     | <a href="#">Population living in (quasi-)jobless households</a> | EU   | Share of people aged 0-59 living in (quasi-)jobless households (i.e. households with very low work intensity), where on average working-age adults (aged 18-59) work 20% or less of their total work potential during the past year.   | Gender;<br>Age: 0-17 (0-5; 6-11; 12-17), 18-59 | This indicator sheds light on an important aspect of social exclusion as it reflects the lack of contact of children and working-age adults with the world of work, and the polarization of employment across households. | Eurostat – EU-SILC |
| SI-P6                     | <a href="#">Early school leavers</a>                            | EU   | Share of persons aged 18 to 24 who have only lower secondary education (their highest level of education or training attained is 0, 1 or 2 according to ISCED 97) and have not received education or training in the four weeks preceding the survey.                          | Gender   |   | Eurostat – LFS     |
| SI-P7                     | <b>Employment gap of immigrants</b>                             | NAT  | Percentage point difference between the employment rate for non-immigrants and that for immigrants. Immigrants are defined on the basis of the variable “born abroad” (and it is up to each country to decide whether to include national born abroad or not, as appropriate). | Gender   | The indicator should be presented both for EU and non-EU migrants.<br><u>The indicator needs to be supplemented by relevant national data covering other key aspects of inclusion of immigrants.</u>                      | Eurostat – LFS     |

| Code                      | Commonly agreed indicator                 | Type (EU indicator/<br>NAT – national indicator) | Definition  | Breakdowns  | Comments  | Data source        |
|---------------------------|---|--|---|---|---|--------------------|
| <b>PRIMARY INDICATORS</b> |   |  |   |   |   |                    |
| SI-P8                     | <a href="#">Material deprivation rate</a> | EU   | Share of population living in households lacking at least 3 items out of the following 9 items: i) to pay rent or utility bills, ii) to keep home adequately warm, iii) to face unexpected expenses, iv) to eat meat, fish or a protein equivalent every second day, v) to have a week's holiday away from home, or could not afford (if wanted to) vi) a car, vii) a washing machine, viii) a colour TV, or ix) a telephone. | Gender<br>Age: 0-17 (0-5; 6-11; 12-17), 18-64, 65+;<br>Poverty status (at-risk-of-poverty/ not at-risk-of-poverty)<br>Activity status (most frequent activity status)<br>Degree of urbanisation<br>Household type |   | Eurostat – EU-SILC |
| SI-P9                     | Housing                                   |  |   |   | Further work is necessary before including an indicator on housing in the primary list. |                    |

| Code                      | Commonly agreed indicator   | Type (EU indicator/<br>NAT – national indicator) | Definition  | Breakdowns   | Comments  | Data source                                  |
|---------------------------|---|--|---|--|---|--|
| <b>PRIMARY INDICATORS</b> |   |  |   |  |   |  |
| SI-P10                    | <a href="#">Self-reported unmet need for medical care (examination)</a><br><br>Care utilisation | NAT  | Total self-reported unmet need for medical examination for the following three reasons: financial barriers + waiting times + too far to travel<br><br>To be analysed together with care utilisation defined as the number of visits to a doctor (GP or specialist) during the last 12 months. | Gender<br><br>Age <sup>(17)</sup> groups:<br>18-44;<br>45-54;<br>55-64; 65+;<br>75+;<br>18-64<br><br>Income quintile | <u>Future developments:</u> to resolve discrepancies in EU-SILC translation between countries. EU-SILC data on care utilisation i.e. the number of physician consultations (contact with a GP or specialist) is to be used (EU-SILC module 2009). Additional source of data on care utilisation i.e. the number of physician consultations is the OECD health data and the EHIS | Eurostat – EU-SILC<br><br>Eurostat – EU-SILC |
| SI-P11                    | Child well-being  |  | <i>To be developed.</i>   |  | Work is on-going on the definition of a child deprivation indicator, to be potentially complemented in the future with other indicators describing child well-being.<br><br>See also indicators under the section “Investing in children”   |  |
| SI-P12                    | Impact of social transfers  | EU   | Reduction in the at-risk-of-poverty rate in percentage (%) due to social transfers, calculated as the percentage difference between the at-risk-of-poverty rate before and after social transfers   | Total population   |   | Eurostat – EU-SILC                           |

<sup>(17)</sup> Note that for the age breakdown of people aged 75 and more there may be some potential statistical difficulties due to the size of samples and non-coverage of collective households by household surveys.

| Code                      | Commonly agreed indicator                       | Type (EU indicator/<br>NAT – national indicator) | Definition  | Breakdowns          | Comments | Data source        |
|---------------------------|---|--|---|---------------------|----------|--------------------|
| <b>PRIMARY INDICATORS</b> |   |  |   |                     |          |                    |
| SI-P13                    | <a href="#">In-work at-risk-of-poverty rate</a> |  | Individuals who are classified as employed according to their most frequent activity status and are at risk of poverty. The distinction is made between “wage and salary employment plus self-employment” and “wage and salary employment” only | Full-time/part-time |          | Eurostat – EU-SILC |

## 4.2. Social inclusion – Secondary indicators

Data for the below indicators in this portfolio can be accessed on the link [Social inclusion](#) (including the more detailed breakdowns mentioned), or for overall figures using the individual links in the table below.

| Code                        | Commonly agreed indicator                                 | Type (EU indicator/<br>NAT – national indicator) | Definition  | Breakdowns                                       | Comments | Data source        |
|-----------------------------|---|--|---|--|----------|--------------------|
| <b>SECONDARY INDICATORS</b> |   |  |   |  |          |                    |
| SI-S1a                      | <a href="#">At-risk-of-poverty rate by household type</a> | EU   | <p>Poverty risk for the total population aged 0+ in the following household types:</p> <p><u>Households with no dependent children:</u></p> <ul style="list-style-type: none"> <li>– Single person, under 65 years old</li> <li>– Single person, 65 years and over</li> <li>– Single women</li> <li>– Single men</li> <li>– Two adults, at least one person 65 years and over</li> <li>– Two adults, both under 65 years</li> <li>– Three or more adults without dependent children</li> </ul> <p><u>Households with dependent children:</u></p> <ul style="list-style-type: none"> <li>– Single parent, 1 or more dependent children</li> <li>– Two adults, one dependent child</li> <li>– Two adults, two dependent children</li> <li>– Two adults, three or more dependent children</li> <li>– Three or more adults with dependent children</li> </ul> | Already specified in the typology of households. |          | Eurostat – EU-SILC |

| Code                        | Commonly agreed indicator   | Type (EU indicator/<br>NAT – national indicator) | Definition   | Breakdowns   | Comments | Data source        |
|-----------------------------|---|--|--|--|----------|--------------------|
| <b>SECONDARY INDICATORS</b> |   |  |  |  |          |                    |
| SI-S1b                      | <a href="#">At-risk-of-poverty rate by the work intensity of households</a> | EU   | <p>Poverty risk for the total population aged 0+ in different work intensity categories and broad household types.</p> <p>The work intensity of the household refers to the number of months that all working age household members have been working during the income reference year as a proportion of the total number of months that could theoretically be worked within the household.</p> <p>Individuals are classified into work intensity categories that range from WI=0 (jobless household) to WI=1 (full work intensity).</p> | <p>Gender (for people above 18);</p> <p>Age: 0-17 (0-5; 6-11; 12-17), 18-64; 65+</p> |          | Eurostat – EU-SILC |
| SI-S1c                      | <a href="#">At-risk-of-poverty rate by most frequent activity status</a>    | EU   | <p>Poverty risk for the adult population (aged 18 years and over) in the following most frequent activity status groups: employment (singling out wage and salary employment); unemployment; retirement; other inactivity</p> <p>The most frequent activity status is defined as the status that individuals declare to have occupied for more than half the number of months in the calendar year for which information on occupational status is available.</p>  | <p>Gender (for people above 18);</p>   |          | Eurostat – EU-SILC |
| SI-S1d                      | <a href="#">At-risk-of-poverty rate by accommodation tenure status</a>      | EU   | <p>Poverty risk for the total population aged 0+ in the following accommodation tenure categories:</p> <ul style="list-style-type: none"> <li>– Owner-occupied or rent free</li> <li>– Rented</li> </ul>   | <p>Gender (for people above 18);</p> <p>Age groups: 0-17; 18-64; 65+</p>             |          | Eurostat – EU-SILC |
| SI-S1e                      | <a href="#">Dispersion around the at-risk-of-poverty threshold</a>          | EU   | <p>Share of persons aged 0+ with an equivalised disposable income below 40%, 50% and 70% of the national equivalised median income.</p>  | <p>Gender (for people above 18);</p> <p>Age groups: 0-17; 18-64; 65+</p>             |          | Eurostat – EU-SILC |

| Code                        | Commonly agreed indicator  | Type (EU indicator/<br>NAT – national indicator) | Definition   | Breakdowns   | Comments   | Data source        |
|-----------------------------|--|--|--|--|--|--------------------|
| <b>SECONDARY INDICATORS</b> |  |  |  |  |  |                    |
| SI-S1f                      | <a href="#">At-risk-of-poverty rate of children living in households at work</a> |  | Poverty risk for the child population (0-17) living in households at work, defined as having work intensity >0.2-1], distinguishing between households working some >0.2-0.55] and a lot >0.55-1]. | Household type   |  | Eurostat – EU-SILC |
| SI-S2                       | Persons with low educational attainment  | EU   | Share of the adult population (aged 25 years and over) whose highest level of education or training is ISCED 0, 1 or 2.  | Gender;<br><br>Age groups:<br>25-34;<br>35-54;<br>55-64; 65+;<br>25-64.  |  | Eurostat           |
| SI-S3                       | Low reading literacy performance of pupils                                       | EU   | Share of 15 years old pupils who are at level 1 or below of the PISA combined reading literacy scale   | Gender   | Available every three years. Benchmark indicator used at EU level in the field of education and training | OECD – PISA        |
| SI-S4                       | <a href="#">Depth of material deprivation</a>                                    | EU   | Un-weighted mean of the number of items lacked by the population concerned out of the nine items retained for the definition of the “material deprivation” indicator (see above, indicator SI-P8)  | Total population<br><br>Poverty status, i.e. at-risk-of-poverty/ not at-risk-of-poverty (definition: see above)<br><br>Deprived/not-deprived breakdown (definition: see above) |  | Eurostat – EU-SILC |

| Code                        | Commonly agreed indicator                    | Type (EU indicator/<br>NAT – national indicator) | Definition  | Breakdowns   | Comments | Data source        |
|-----------------------------|--|--|---|--|----------|--------------------|
| <b>SECONDARY INDICATORS</b> |  |  |   |  |          |                    |
| SI-S5                       | <a href="#">Housing cost overburden rate</a> | EU   | <p>Percentage of the population living in a household where total housing costs (net of housing allowances) represent more than 40% of the total disposable household income (net of housing allowances).</p> <p>Housing costs include mortgage interest payments (net of any tax relief) for owners and rent payments, gross of housing benefits for renters, housing benefits for rent free households. They also include structural insurance, mandatory services and charges (sewage removal, refuse removal, etc.), regular maintenance and repairs, taxes and the cost of utilities (water, electricity, gas and heating). They do not include capital repayment for mortgage holders.</p> <p>Housing allowances include rent benefits (a current means-tested transfer granted by public authorities to tenants, temporarily or on a long-term basis, to help them with rent costs) and benefits to owner-occupiers (a means-tested transfer by public authority to owner occupiers to alleviate their current housing costs; in practice, often help with mortgage reimbursements).</p> | <p>Gender</p> <p>Age: 0-17 (0-5; 6-11; 12-17), 18-64, 65+</p> <p>Income quintiles</p> <p>Poverty status (at-risk-of-poverty; not at-risk-of-poverty)</p> <p>Activity status (most frequent activity status)</p> <p>Tenure status</p> <p>Degree of urbanisation</p> <p>Household type</p> |          | Eurostat – EU-SILC |

| Code                        | Commonly agreed indicator          | Type (EU indicator/NAT – national indicator) | Definition  | Breakdowns  | Comments                                     | Data source        |
|-----------------------------|------------------------------------|--|---|---|--|--------------------|
| <b>SECONDARY INDICATORS</b> |                                    |  |   |   |  |                    |
| SI-S6                       | <a href="#">Overcrowding rate</a>  |  | <p>Percentage of people living in an overcrowded household</p> <ul style="list-style-type: none"> <li>– all households</li> <li>– excluding single households.</li> </ul> <p>The person is considered as living in an overcrowded household if the household does not have at its disposal at least:</p> <ul style="list-style-type: none"> <li>– 1 room for the household;</li> <li>– 1 room for each couple;</li> <li>– 1 room for each single person 18+;</li> <li>– one room for two single people of the same sex between 12-17 years of age;</li> <li>– one room for each single person of different sex between 12 and 17 years of age;</li> <li>– one room for two people under 12 years of age.</li> </ul> | <p>Gender</p> <p>Age: 0-17 (0-5; 6-11; 12-17), 18-64, 65+</p> <p>For all households:</p> <ul style="list-style-type: none"> <li>– poverty status (at-risk-of-poverty; not at-risk-of-poverty)</li> <li>– tenure status</li> <li>– degree of urbanisation</li> <li>– household type</li> </ul> <p>Excluding single households:</p> <ul style="list-style-type: none"> <li>– poverty status (at-risk-of-poverty; not at-risk-of-poverty)</li> </ul> |  | Eurostat – EU-SILC |
| SI-S7                       | <b>Housing deprivation by item</b> | n.a.   | <p>Percentage of the population deprived of each housing deprivation item, and <a href="#">by number of items</a></p> <p>The following housing deprivation items are considered:</p> <ul style="list-style-type: none"> <li>– <a href="#">Leaking roof, damp walls/floors/foundations, or rot in window frames or floors;</a></li> <li>– <a href="#">No bath or shower in the dwelling;</a></li> <li>– <a href="#">No indoor flushing toilet for the sole use of the household;</a></li> <li>– <a href="#">Dwelling too dark.</a></li> </ul>  | <p>Gender</p> <p>Age: 0-17 (0-5; 6-11; 12-17); 18-64; 65+</p> <p>Poverty status (at-risk-of-poverty; not at-risk-of-poverty)</p> <p>Household type</p> <p>Degree of urbanisation</p>  | This indicator needs to be further improved. | Eurostat – EU-SILC |

| Code                        | Commonly agreed indicator                               | Type (EU indicator/<br>NAT – national indicator) | Definition   | Breakdowns                                   | Comments   | Data source        |
|-----------------------------|---|--|--|--|--|--------------------|
| <b>SECONDARY INDICATORS</b> |   |  |  |  |  |                    |
| SI-S8                       | <b>Impact of social transfers by age</b>                |  | Reduction in the at-risk-of-poverty rate in % due to social transfers, calculated as the percentage difference between the at-risk-of-poverty rate before and after social transfers | Age: 0-17; 18-64                             | The inclusion of the indicator for the 18-64 age group is subject to an analysis of the results looking at both the options of including and excluding pensions. | Eurostat – EU-SILC |
| SI-S9                       | <a href="#">Population living in jobless households</a> | EU   | Proportion of people living in jobless households, expressed as a share of all people in the same age group <sup>(18)</sup> .  | Gender (aged 18-59 only)<br>Age: 0-17, 18-59 | LFS-based indicator.<br>This indicator should be analysed in the light of the context information on jobless households by main household types                  | Eurostat – LFS     |

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<sup>(18)</sup> Students aged 18-24 years who live in households composed solely of students are not counted in neither numerator nor denominator.

### 4.3. Social inclusion – Context information

Data for the below information items in this portfolio can be accessed on the link [Social inclusion](#) (including the more detailed breakdowns mentioned), or for overall figures using the individual links in the table below.

| Code                       | Commonly agreed information item  | Type (EU/<br>NAT –<br>national) | Definition  | Breakdowns | Comments | Data source        |
|----------------------------|---|---------------------------------|---|------------|----------|--------------------|
| <b>CONTEXT INFORMATION</b> |   |                                 |   |            |          |                    |
| SI-C1                      | <a href="#">Income quintile ratio (S80/S20)</a>                                     | EU                              | The ratio of total income received by the 20% of the country's population with the highest income (top quintile) to that received by the 20% of the country's population with the lowest income (lowest quintile). Income must be understood as equivalised disposable income.  |            |          | Eurostat – EU-SILC |
| SI-C2                      | <a href="#">Gini coefficient</a>  | EU                              | The Gini coefficient measures the extent to which the distribution of income deviates from a perfectly equal distribution.<br>It is a summary measure of the cumulative share of equivalised income accounted for by the cumulative percentages of the number of individuals. Its value ranges from 0% (complete equality) to 100% (complete inequality). |            |          | Eurostat – EU-SILC |
| SI-C3                      | <a href="#">Regional disparities – coefficient of variation of employment rates</a> | NAT                             | The dispersion of employment rates (measured using the coefficient of variation) across NUTS level 2.   |            |          | Eurostat – LFS     |

| Code                       | Commonly agreed information item   | Type (EU/<br>NAT –<br>national) | Definition  | Breakdowns  | Comments   | Data source  |
|----------------------------|--|---------------------------------|---|---|--|--|
| <b>CONTEXT INFORMATION</b> |  |                                 |   |   |  |  |
| SI-C4a                     | <a href="#">Healthy life expectancy (e.g. at birth)</a>                                    | NAT                             | Number of years that a person (at birth and at 65) is still expected to live in a healthy condition. To be interpreted jointly with life expectancy.  | Gender (figures are available only for men and women separately);<br>Age (at birth, at 65);<br>Socio-economic status (level of education, income quintile) when available |  | There are two components to the calculations - mortality statistics (Eurostat's demographic database) and data on self-perceived disability (Eurostat – EU-SILC) |
| SI-C4b                     | <a href="#">Life expectancy</a>  | NAT                             | Life expectancy defined as the mean number of years that a new-born child (or a person of a specific age) can expect to live if subjected throughout life to the current mortality conditions (age specific probabilities of dying).  | Gender (figures are available only for men and women separately);<br>Age (at birth, at 65)  |  | Eurostat – Demographic database  |
| SI-C5                      | <a href="#">At-risk-of-poverty rate anchored at a fixed moment in time (2008)</a>          | EU                              | Share of persons aged 0+ with an equivalised disposable income below the at-risk-of-poverty threshold calculated in survey year 2005, up-rated by inflation over the years  |   |  | Eurostat – EU-SILC   |
| SI-C6                      | <a href="#">At-risk-of-poverty rate before social cash transfers (other than pensions)</a> | EU                              | The share of persons with an equivalised disposable income, before social transfers, below the risk-of-poverty threshold, which is set at 60% of the national median equivalised disposable income (after social transfers). Retirement and survivor's pensions are counted as income before transfers and not as social transfers. |   | This is meant to compare the observed risk of poverty with a hypothetical measure of a risk of poverty in the absence of all social transfers (other than pensions) all things being kept equal. In particular, household and labour market structure are kept unchanged. This measure does not take into account other types of transfers that have an impact on household disposable income such as transfers in kind and tax rebates. | Eurostat – EU-SILC   |

| Code                       | Commonly agreed information item  | Type (EU/<br>NAT –<br>national) | Definition  | Breakdowns   | Comments  | Data source               |
|----------------------------|---|---------------------------------|---|--|---|---------------------------|
| <b>CONTEXT INFORMATION</b> |   |                                 |   |  |   |                           |
| SI-C7                      | <a href="#">Jobless households by main household type</a>               | EU                              | Proportion of people living in jobless households, expressed as a share of all people in the same age group   | Household type   |   | Eurostat – LFS            |
| SI-C8                      | <a href="#">In-work at-risk-of-poverty rate</a>                         | EU                              | Individuals who are classified as employed and who are at risk of poverty.  | Full-time/part-time  | Individuals classified as employed according to the definition of most frequent activity status. The most frequent activity status is defined as the status that individuals declare to have occupied for more than half the number of months in the calendar year. | Eurostat – EU-SILC        |
| SI-C9a                     | <b>Making work pay indicators:</b><br><a href="#">Unemployment trap</a> | n.a.                            | The percentage of gross earnings which is taxed away through higher tax and social security contributions and the withdrawal of unemployment and other benefits when an unemployed person returns to employment | Available only for single persons without children earning 67% of the average worker when in work  |   | EC/OECD tax-benefit model |
| SI-C9b                     | <b>Making work pay indicators: inactivity trap</b>                      | n.a.                            | Total increase in effective tax burden resulting from a transition from labour market inactivity to a full time low-wage job with and without childcare costs as % of gross earnings in new job.                | Household type (single without children, couple without children, lone parent with two children, two-earner couple with two children); by wage level |   | EC/OECD tax-benefit model |

| Code                       | Commonly agreed information item   | Type (EU/<br>NAT –<br>national) | Definition  | Breakdowns  | Comments  | Data source   |
|----------------------------|--|---------------------------------|---|---|---|---|
| <b>CONTEXT INFORMATION</b> |  |                                 |   |   |   |   |
| SI-C9c                     | <b>Making work pay indicators:</b> <a href="#">low-wage trap</a>                             | n.a.                            | The percentage of gross earnings which is taxed away through the combined effects of income taxes, social security contributions and any withdrawal of benefits when gross earnings increase from 33% to 67% of average wage. | Household type (single person without children; one-earner couple with two children)                      |   | EC/OECD tax-benefit model   |
| SI-C10                     | <b>Net income of social assistance recipients as a % of the at-risk-of-poverty threshold</b> | n.a.                            | Net income of social assistance recipients as % of the at-risk of poverty rate threshold  | Jobless household type (single without children; lone parent with two children; couple with two children) | <p>This refers to the income of people living in households that only rely on “last resort” social assistance benefits (including related housing benefits) and for which no other income stream is available (from other social protection benefits – e.g. unemployment or disability schemes – or from work). The aim is to evaluate if the safety nets provided to those households most excluded from the labour market are sufficient to lift people out of poverty.</p> <p>It is only calculated for countries where non-categorical social benefits are in place and is especially relevant when analysing MWP indicators.</p> | <p>Income of social assistance recipients: EC/OECD tax-benefit model</p> <p>Risk-of-poverty threshold: Eurostat – EU-SILC</p> |

| Code                       | Commonly agreed information item  | Type (EU/<br>NAT –<br>national) | Definition   | Breakdowns  | Comments | Data source        |
|----------------------------|---|---------------------------------|--|---|----------|--------------------|
| <b>CONTEXT INFORMATION</b> |   |                                 |  |   |          |                    |
| SI-C11                     | <a href="#">Self-reported limitations in daily activities</a>               | n.a.                            | Self-reported limitations in daily activities defined as the percentage sum of people reporting to be limited or very limited.   | Gender; age (18-44, 45-54; 55-64; 65+; 75+);<br>Income quintile   |          | Eurostat – EU-SILC |
| SI-C12                     | <a href="#">Share of housing costs in total disposable household income</a> | n.a.                            | Median of the distribution among individuals of the share of housing costs (net of housing allowances) in total disposable income (net of housing allowances)<br>– median for the total population<br>– median for population at-risk-of poverty | Gender; age (0-17; 18-64; 65+);<br>Poverty status (at-risk-of-poverty; not at-risk-of-poverty);<br>Degree of urbanisation |          | Eurostat – EU-SILC |

## 5. PENSIONS PORTFOLIO

The list of indicators under the pension portfolio reflects the three streamlined objectives as regards pensions:

- adequate retirement incomes for all and access to pensions which allow people to maintain, to a reasonable degree, their living standard after retirement, in the spirit of solidarity and fairness between and within generations;
- the financial sustainability of public and private pension schemes, bearing in mind pressures on public finances and the ageing of populations, and in the context of the three pronged strategy for tackling the budgetary implications of ageing, notably by: supporting longer working lives and active ageing; by balancing contributions and benefits in an appropriate and socially fair manner; and by promoting the affordability and the security of funded and private schemes;
- that pension systems are transparent, well adapted to the needs and aspirations of women and men and the requirements of modern societies, demographic ageing and structural change; that people receive the information they need to plan their retirement and that reforms are conducted on the basis of the broadest possible consensus.

## 5.1. First streamlined objective – adequate pensions

*"Ensure adequate retirement incomes for all and access to pensions which allow people to maintain, to a reasonable degree, their living standard after retirement, in the spirit of solidarity and fairness between and within generations."*

Data for the below indicators in this portfolio can be accessed on the link [Pensions](#) (including the more detailed breakdowns mentioned), or for overall figures using the individual links in the tables below.

| Code                      | Commonly agreed indicator                                | Type (EU indicator/<br>NAT – national indicator) | Definition   | Breakdowns | Comments  | Data source        |
|---------------------------|--|--|--|------------|---|--------------------|
| <b>PRIMARY INDICATORS</b> |  |  |  |            |   |                    |
| PN-P1                     | <a href="#">At-risk-of-poverty rate of older people</a>  | EU   | Risk of poverty for people aged 65+<br><br>Complemented by composition of income   | Gender     | Poverty rate of 65+ (at the 60% threshold of equivalised disposable income) provides a key indication of the capacity of pension systems to provide adequate income to older people | Eurostat – EU-SILC |
| PN-P2                     | <a href="#">Median relative income of elderly people</a> | EU   | Median equivalised disposable income of people aged 65+ as a ratio of income of people aged 0-64   | Gender     | This indicator informs on the overall adequacy of income of older people. Related context information: composition of income  | Eurostat – EU-SILC |
| PN-P3                     | <a href="#">Aggregate replacement ratio</a>              | EU   | Ratio of the median individual pensions of the 65-74 age group relative to median individual earnings of the 50-59 age group, excluding other social benefits. | Gender     | This indicator informs on the overall adequacy of income of pensioners, in relation to older workers<br><br>Currently pension income encompasses only first pillar schemes.         | Eurostat – EU-SILC |

| Code                      | Commonly agreed indicator   | Type (EU indicator/<br>NAT – national indicator) | Definition   | Breakdowns | Comments   | Data source             |
|---------------------------|---|--|--|------------|--|-------------------------|
| <b>PRIMARY INDICATORS</b> |   |  |  |            |  |                         |
| PN-P4                     | <p><b>Change in projected theoretical replacement ratio for base case 2006-2046 accompanied with information on type of pension scheme (DB, DC or NDC) and change in projected public pension expenditure 2006-2046 )</b></p> <p><b>These results should systematically be presented collectively in one table.</b></p> <p><b>+ assumptions and relevant background information on representativeness</b></p> <p><b>+ present also calculations of changes in replacement rates for one or two other cases, if suitable (for instance OECD)</b></p> | NAT  | <p>Change in the theoretical level of income from pensions at the moment of take-up related to the income from work in the last year before retirement for a hypothetical worker (base case), percentage points, 2006-2046, with information on the type of pension scheme (DB, DC or NDC) and changes in the public pension expenditure as a share of GDP, 2006-2046.</p> <p>This information can only collectively form the indicator called Projected theoretical replacement ratio.</p> <p>Results relate to current and projected, gross (public and private) and total net replacement rates, and should be accompanied by information on representativeness and assumptions (contribution rates and coverage rate, public and private).</p> <p>Specific assumptions agreed in the ISG. For further details, see Updates of current and prospective theoretical pension replacement rates 2006-2046.</p> | None       | <p>Information on the development of future adequacy has to be complemented by information on future sustainability (projections of pension expenditures).</p> <p>Theoretical replacement rates provide key elements on the current replacement levels and their likely evolution, in response to enacted reforms, especially for DC schemes. They provide comprehensive similar information for DB schemes when if used with appropriate information regarding the sustainability of such schemes.</p> <p>Other NAT indicators: other cases including differences in careers and in retirement age.</p> | Source: ISG and EPC-AWG |

| Code                        | Commonly agreed indicator  | Type (EU indicator/<br>NAT – national indicator) | Definition   | Breakdowns                          | Comments   | Data source        |
|-----------------------------|--|--|--|-------------------------------------|--|--------------------|
| <b>SECONDARY INDICATORS</b> |  |  |  |                                     |  |                    |
| PN-S1                       | <a href="#">At-risk-of poverty rate of older people</a>          | EU   | Risk of poverty for people aged 0-59, 0-74, 60+, 75+ <sup>(19)</sup>   | Age: 0-59, 0-74, 60+, 75+<br>Gender | Poverty rate of elderly people (at the 60% threshold of equivalised income).<br><br>These breakdowns allow to isolate the specific situation of different age groups (younger/older) than the primary indicator. | Eurostat – EU-SILC |
| PN-S2                       | <a href="#">Median relative income of elderly people (60+)</a>   | EU   | Median equivalised disposable income of people aged 60+ as a ratio of equivalised disposable income of people aged 0-59                                    | Gender                              | This indicator informs on the overall adequacy of income of older people<br><br>Related indicator: composition of income   | Eurostat – EU-SILC |
| PN-S3                       | <b>Aggregate replacement ratio (incl. other social benefits)</b> | EU   | Ratio of median individual pensions of the 65-74 age group relative to median individual earnings of the 50-59 age group, including other social benefits. | Gender                              | Currently pension income encompasses only first pillar schemes.  | Eurostat – EU-SILC |
| PN-S4                       | <a href="#">Income inequality among population aged 65+</a>      | EU   | Income quintile ratio (S80/S20) among population aged 65+  | Age: 0-64, 65+                      | This indicator informs on the part of the objective on solidarity between generations and provides an indication on the income distribution for the age group 0-64 and older people aged 65+.                    | Eurostat – EU-SILC |

<sup>(19)</sup> One should note that for the age breakdown of people aged 75 and more, there may be some potential statistical difficulties due to the size of samples, and non-coverage of collective households by household surveys.

| Code                        | Commonly agreed indicator   | Type (EU indicator/<br>NAT – national indicator) | Definition  | Breakdowns            | Comments   | Data source        |
|-----------------------------|---|--|---|-----------------------|--|--------------------|
| <b>SECONDARY INDICATORS</b> |   |  |   |                       |  |                    |
| PN-S5                       | <a href="#">At-risk-of-poverty gap of elderly people</a>  | EU   | Poverty gap by age brackets (for 65+ and 75+) at the 60% threshold  | Age: 65+, 75+         | This indicator complements indicators on poverty rates and is complementary to sensitivity analysis  | Eurostat – EU-SILC |
| PN-S6                       | <a href="#">At-risk-of-poverty rate of pensioners</a>   | EU   | At-risk-of-poverty rate restricted to the field of people whose main activity status is 'retired'   | Gender                | This indicator complements indicators on poverty rates for people whose status is retired. See also indicators for the third streamlined objective | Eurostat – EU-SILC |
| PN-S7                       | <a href="#">Incidence of risk of elderly poverty by housing tenure status</a>                                   | EU   | Incidence of risk of poverty for people belonging to the 60+, 65+ and 75+ age groups by the housing tenure status of their households: full ownership, owner still paying mortgage; tenants at market price; tenants at subsidised price or rent free | Age:<br>60+, 65+, 75+ | This indicator complements indicators on poverty rates for different housing tenure status   | Eurostat – EU-SILC |
| PN-S8                       | <a href="#">Risk of poverty calculated at 50% and 70% of median national equivalised income for the elderly</a> | EU   | Risk of poverty calculated at 50% and 70% of median national equivalised income for people aged 60+, 65+ and 75+.   | Age:<br>60+, 65+, 75+ | Sensitivity tests for different income thresholds  | Eurostat – EU-SILC |

### **Context information**

PN-C1: Composition of income by source (pensions; other social benefits; earnings from work; other sources) and by income quintile for people aged 60+, 65+, 75+ (EU type item).

## 5.2. Second streamlined objective – sustainable pensions

*“Ensure the financial sustainability of public and private pension schemes, bearing in mind pressures on public finances and the ageing of populations, and in the context of the three-pronged strategy for tackling the budgetary implications of ageing, notably by: supporting longer working lives and active ageing; by balancing contributions and benefits in an appropriate and socially fair manner; and by promoting the affordability and the security of funded and private schemes.”*

Data for the below indicators in this portfolio can be accessed on the link [Pensions](#) (including the more detailed breakdowns mentioned), or for overall figures using the individual links in the table below.

| Code                      | Commonly agreed indicator                                    | Type (EU indicator/<br>NAT – national indicator) | Definition   | Breakdowns  | Comments  | Data source        |
|---------------------------|--|--|--|---|---|--------------------|
| <b>PRIMARY INDICATORS</b> |  |  |  |   |   |                    |
| PN-P5                     | <a href="#">Total current pension expenditure (% of GDP)</a> | NAT  | “Pension expenditure” is the sum of seven different categories of benefits, as defined in the ESSPROS Manual 1996: disability pension, early retirement benefit due to reduced capacity to work, old-age pension, anticipated old-age pension, partial pension, survivors' pension and early retirement benefit for labour market reasons. | None  | In development: breakdown between public/private  | Eurostat – ESSPROS |
| PN-P6                     | <a href="#">Employment rate</a>                              | EU   | % of persons employed in relation to the total number of people in a given age group.  | Age: 25-54; 55-64 (55-59 and 60-64); 65-69<br><br>and all by gender | Employment rate of 55-64 people is an essential aspect of sustainability.<br><br>These breakdowns are essential to analyse more in detail the change in employment rates with age brackets and paths of early exit from the labour market. Gender breakdowns also enable to isolate the structural effect of the trend of the increase in women’s employment rates. | Eurostat – LFS     |

| Code                      | Commonly agreed indicator   | Type (EU indicator/<br>NAT – national indicator) | Definition   | Breakdowns | Comments  | Data source    |
|---------------------------|---|--|--|------------|---|----------------|
| <b>PRIMARY INDICATORS</b> |   |  |  |            |   |                |
| PN-P7                     | <a href="#">Effective labour market exit age</a><br><br>NOW REPLACED BY<br><a href="#">Duration of working life</a> | EU   | <p>The average age of withdrawal from the labour market, based on a probability model considering the relative changes of activity rates from one year to another at a specific age.</p> <p>The duration of working life indicator measures the number of years a person at a given age is expected to be active in the labour market.</p> | Gender     | <p>The central challenge is probably the extent to which pension reforms will translate into an increase of the effective retirement age.</p> <p>The effective LM exit age indicator has been discontinued. A new indicator called 'duration of working life' has been developed to replace the old 'average exit age'.</p>   | Eurostat – LFS |
| PN-P8                     | <b>Projections of pension expenditure, public and total, 2004-2050 (% of GDP)</b>                                   | NAT  | Specific assumptions agreed in the AWG. For further details, see the 2009 Ageing Report: Underlying Assumptions and Projection Methodologies for the EU-27 Member States (2007-2060)   | None       | Projections of pension expenditures also reflect assumptions made on economic trends (notably evolution of employment rates, in particular for older workers). Attention should be drawn to the extent that the various methodologies used by Member States may not ensure full consistency and comparability (in particular in the coverage of private and occupational pensions). | EPC-AWG        |

| Code                        | Commonly agreed indicator  | Type (EU indicator/<br>NAT – national indicator) | Definition   | Breakdowns | Comments  | Data source        |
|-----------------------------|--|--|--|------------|---|--------------------|
| <b>SECONDARY INDICATORS</b> |  |  |  |            |   |                    |
| PN-S9                       | <a href="#">Total social protection expenditures (% of GDP)</a>              | NAT  | Total expenditure on social protection (as % of GDP)   | None       | In development: gross/net expenditure   | Eurostat – ESSPROS |
| PN-S10                      | <b>Decomposition of the projected increase in public pension expenditure</b> | NAT  | Decomposition with the old age dependency ratio, the employment effect, the take-up ratio and the benefit ratio.<br><br>Specific assumptions agreed in the AWG.<br><br>For further details, see the 2009 Ageing Report: Underlying Assumptions and Projection Methodologies for the EU-27 Member States (2007-2060). | None       | Projections of pension expenditures also reflect assumptions made on economic trends (notably evolution of employment rates, in particular for older workers).<br><br>Attention should be drawn to the extent that the various methodologies used by Member States may not ensure full consistency and comparability (in particular in the coverage of private and occupational pensions) | EPC-AWG            |

### **Context information**

**PN-C2** **EU: Old-age dependency ratio (Current and projected for 2010, 2030, 2050) – ESTAT <sup>(20)</sup>**

**PN-C3** **EU: Evolution of life expectancy at birth and at ages 60 and 65, by gender (current and projected)**

**PN-C4** **NAT: Pension system dependency ratio** (Number of pensioners relative to contributors, current and projected up to 2050. Specific assumptions by AWG) <sup>(21)</sup>

**PN-C5** **NAT: Contribution to public and private pension schemes** (Pension contributions to public pension schemes as a share of GDP, current and projected to 2050). *Source*: AWG

<sup>(20)</sup> The development of dependency ratios provides key information on future pressures on pension systems expenditures and resources.

<sup>(21)</sup> See “The 2005 EPC projections of age-related expenditure (2004-2050) for the EU-25 Member States: underlying assumptions and projection methodologies”.

### 5.3. Third streamlined objective – modernised pensions

*“Ensure that pension systems are transparent, well adapted to the needs and aspirations of women and men and the requirements of modern societies, demographic ageing and structural change; that people receive the information they need to plan their retirement and that reforms are conducted on the basis of the broadest possible consensus.”*

Data for the below indicators in this portfolio can be accessed on the link [Pensions](#) (including the more detailed breakdowns mentioned), or for overall figures using the individual links in the table below.

| Code                      | Commonly agreed indicator   | Type (EU indicator/<br>NAT – national indicator) | Definition   | Breakdowns   | Comments   | Data source        |
|---------------------------|---|--|--|--|--|--------------------|
| <b>PRIMARY INDICATORS</b> |   |  |  |  |  |                    |
| PN-P9                     | <a href="#">Gender differences in the risk of poverty</a>                 | EU   | The absolute difference between males and females in the at-risk-of-poverty rate for single-person households (see at-risk-of-poverty rate)  | Age: 0-65, 65+<br><br>Total + women/men living alone | Related secondary indicators: by age group (60+ and 75+ and below 60, 75); | Eurostat – EU-SILC |
| PN-P10                    | <a href="#">Gender differences in the relative income of older people</a> | EU   | The absolute difference between males and females in the relative income of elderly people (65 and more) for single-person households.<br><br>See relative income for 65+, in relation to the 0-64 population  | Total + women/men living alone                       | Related secondary indicators: by age group (60+ and 75+ and below 60, 75); | Eurostat – EU-SILC |
| PN-P11                    | <a href="#">Gender differences in aggregate replacement ratio</a>         | EU   | The absolute difference between males and females in the aggregate replacement ratio. The aggregate replacement ratio is defined as the ratio of the median individual gross pensions of 65-74 age category relative to median individual gross earnings of 50-59 age category, excluding other social benefits. |  |  | Eurostat – EU-SILC |

| Code                        | Commonly agreed indicator   | Type (EU indicator/<br>NAT – national indicator) | Definition   | Breakdowns  | Comments | Data source        |
|-----------------------------|---|--|--|---|----------|--------------------|
| <b>SECONDARY INDICATORS</b> |   |  |  |   |          |                    |
| PN-S11                      | <a href="#">Gender differences in the relative income of older people</a> | EU   | The absolute difference between males and females in the relative median income ratio, which is the ratio between the median equivalised disposable income of persons aged 65 or over and the median equivalised disposable income of persons aged between 0 and 64. | Age groups: 60+, 75+, below 60 and below 75);<br>Total + women/men living alone |          | Eurostat – EU-SILC |

## 6. HEALTH AND LONG-TERM CARE PORTFOLIO

This section contains the set of common indicators to reflect the following common objectives in the area of health care and long-term care:

- access for all to adequate health and long-term care and that the need for care does not lead to poverty and financial dependency; and that inequities in access to care and in health outcomes are addressed;
- quality in health and long-term care and by adapting care, including developing preventive care, to the changing needs and preferences of society and individuals, notably by developing quality standards reflecting best international practice and by strengthening the responsibility of health professionals and of patients and care recipients;
- that adequate and high quality health and long-term care remains affordable and financially sustainable by promoting a rational use of resources, notably through appropriate incentives for users and providers, good governance and coordination between care systems and public and private institutions. Long-term sustainability and quality require the promotion of healthy and active life styles and good human resources for the care sector.

The list of indicators is built on the statistics used in the national reports on social protection and social inclusion, on various projects regarding the development of health indicators such as the European Community Health Indicators project (ECHI) and the OECD Health Care Quality Indicators project (OECD HCQI), and on current data availability from international sources such as EUROSTAT, OECD health data, WHO health for all database (WHO-HFA) and national sources. It is the result of a joint effort by Member States delegates (notably of the ISG of the Social Protection Committee but also of Economic Policy Committee) and various Commission services such as DG EMPL, EUROSTAT, DG SANTE and DG ECFIN.

Note that while there is a large pool of statistics related to health and health care, this proposal focuses on those indicators relevant to social protection and that best cover the agreed common objectives for health and long-term care as part of the EU cooperation in the field of social protection and social inclusion. The list includes EU and national indicators, and outcome indicators as well as input and process indicators, as a combination of such types of indicators was deemed necessary in the area of health care and long-term care especially when addressing health and long-term care issues from a social protection perspective.

The list will be reviewed against ongoing statistical and indicator developments. Similarly, long-term care is becoming a growing field of interest which may not be fully reflected in the current set of indicators, mainly because of the lack of international and comparable data.

Hence, the list may be adapted or supplemented by other indicators, specially taking into account the recent activity to establish a Joint Assessment Framework for Health, which has provided a renewed incentive to the development of further indicators in this area, as well as the 2014 SPC report on "[Adequate social protection for long-term care needs in an ageing society](#)."

## 6.1. Indicators regarding access to care (including inequity in access to care) and inequalities in outcomes (objective 1)

Data for the below indicators in the portfolio can be accessed on the link [Health and long term care](#) (including the more detailed breakdowns mentioned), or for overall figures using individual links in the table below.

| Code                      | Commonly agreed indicator   | Type (EU indicator/<br>NAT – national indicator) | Definition   | Breakdowns  | Comments  | Data source   |
|---------------------------|---|--|--|---|---|---|
| <b>PRIMARY INDICATORS</b> |   |  |  |   |   |   |
| HC-P1                     | <a href="#">Self-reported unmet need for medical care (examination)</a> | NAT  | Total self-reported unmet need for medical examination for the following three reasons: financial barriers + waiting times + too far to travel | Gender  | <u>Future developments:</u> resolve discrepancies in EU-SILC translation between countries.<br><br>– EU-SILC data on care utilisation i.e. the number of physician consultations (contact with a GP or specialist) is to be used (EU-SILC module 2009). Additional source of data on care utilisation i.e. the number of physician consultations (contact with a GP or specialist) is the OECD health data and the EHS. | Eurostat – EU-SILC<br><br>Eurostat – EU-SILC                    |
|                           | Care utilisation  | NAT  | To be analysed together with care utilisation defined as the number of visits to a doctor (GP or specialist) during the last 12 months.        | Age groups:<br>18-44;<br>45-54;<br>55-64;<br>65+;<br>75+;<br>18-64<br><br>Income quintile |   |   |
| HC-P2                     | <a href="#">Self-reported unmet need for dental care (examination)</a>  | NAT  | Total self-reported unmet need for dental care for the following three reasons: financial barriers + waiting times + too far to travel         | Gender  | <u>Future developments:</u> resolve discrepancies in EU-SILC translation between countries.<br><br>– To look at care utilisation Member States could use the number of dentist consultations per capita based on OECD health data and national sources for non-OECD members. Additional source of data is the EHS.  | Eurostat – EU-SILC<br><br>EHIS, OECD health data, national data |
|                           | Dental care utilisation   |  | To be analysed together with dental care utilisation defined as the number of visits to the dentist.   | Age groups:<br>18-44;<br>45-54;<br>55-64;<br>65+;<br>75+;<br>18-64<br><br>Income quintile |   |   |

| Code                      | Commonly agreed indicator   | Type (EU indicator/<br>NAT – national indicator) | Definition  | Breakdowns                                | Comments   | Data source                    |
|---------------------------|---|--|---|---|--|--------------------------------|
| <b>PRIMARY INDICATORS</b> |   |  |   |   |  |                                |
| HC-P3                     | <b>The proportion of the population covered by health insurance</b> | NAT  | The percentage of the population covered by public health insurance (which is defined as tax-based public health insurance and income-related payroll taxes including social security contribution schemes) + the percentage of the population covered by private health insurance including: Private mandatory health insurance, Private employment group health insurance, Private community-rated health insurance, and Private risk-rated health insurance. | Gender (if available)                     | <p>– Member states should highlight the role of the insurance according to the OECD classification i.e. primary, complementary, duplicate and supplementary. This should be taken into account in the presentation of the indicator in the EU reporting exercise. Member States should provide this information either directly using national data sources or via OECD data.</p> <p>– If applicable and available information on insurance coverage should be provided by gender.</p> | OECD and national data sources |
| HC-P4a                    | <a href="#">Life expectancy</a>                                     | EU   | The mean number of years that a new born child (or that of a specific age) can expect to live if subjected throughout his life to the current mortality conditions (age specific probabilities of dying)  | Gender<br><br>Age: at birth, at 45, at 65 |  | Eurostat                       |
| HC-P4b                    | <b>Life expectancy by socio economic status</b>                     | NAT  | Life expectancy defined as above but presented by socioeconomic status (such as level of education or income quintile) (at birth = socio-economic status of parents).   | Gender (if available)                     |  | Eurostat                       |

| Code                      | Commonly agreed indicator                          | Type (EU indicator/<br>NAT – national indicator) | Definition   | Breakdowns                                | Comments   | Data source             |
|---------------------------|--|--|--|---|--|-------------------------|
| <b>PRIMARY INDICATORS</b> |  |  |  |   |  |                         |
| HC-P5a                    | <a href="#">Healthy life years</a>                 | NAT  | Number of years that a person is expected to live in a healthy condition, i.e. the number of years of life free of any activity limitation (also called disability – free life expectancy). Based on self-perceived limitations in daily activities. | Gender<br><br>Age: at birth, at 45, at 65 | To be interpreted jointly with life expectancy   | Eurostat                |
| HC-P5b                    | <b>Healthy life years by socio-economic status</b> | NAT  | Healthy life years defined as above but presented by socio-economic status (such as level of education, income quintile) (at birth = socio-economic status of parents).  | Gender (if available)                     | Healthy life years by socio-economic status is to be reported using national data sources when available until EU comparable breakdown data becomes available. If applicable and statistically meaningful, socio-economic status information could be further disaggregated by gender. | Eurostat, national data |

| Code                        | Commonly agreed indicator                                    | Type (EU indicator/<br>NAT – national indicator) | Definition   | Breakdowns   | Comments   | Data source        |
|-----------------------------|--|--|--|--|--|--------------------|
| <b>SECONDARY INDICATORS</b> |  |  |  |  |  |                    |
| HC-S1                       | <a href="#">Self-perceived limitations in daily activity</a> | NAT  | Self-perceived limitations in daily activities defined as the percentage sum of people reporting to be limited or very limited.  | Gender<br><br>Age groups: 18-44;<br>45-54; 55-64;<br>65+; 75+; 18-64<br><br>Income quintile    |  | Eurostat – EU-SILC |
| HC-S2                       | <a href="#">Self-perceived general health</a>                | NAT  | Self-perceived general health defined as the percentage sum of people reporting bad or very bad health.  | Gender<br><br>Age groups:<br>18-44;<br>45-54; 55-64;<br>65+; 75+; 18-64<br><br>Income quintile |  | Eurostat – EU-SILC |
| HC-S3a                      | <a href="#">Infant mortality</a>                             | EU   | The ratio of the number of deaths of children under one year of age during the year to the number of live births in that year. The value is expressed per 1 000 live births. | Gender   |  | Eurostat           |
| HC-S3b                      | <b>Infant mortality by socio-economic status</b>             | NAT  | Infant mortality as defined above but presented by socio-economic status of parents (such as level of education, income quintile...)   | None   | To be reported using national data sources when available until EU comparable breakdown data becomes available | National data      |

## 6.2. Indicators regarding quality of care: effectiveness, safety and patient centeredness (2nd objective)

Data for the below indicators in the portfolio can be accessed on the link [Health and long term care](#) (including the more detailed breakdowns mentioned), or for overall figures using individual links in the table below.

| Code                      | Commonly agreed indicator                 | Type (EU indicator/<br>NAT – national indicator) | Definition  | Breakdowns | Comments  | Data source   |
|---------------------------|---|--|---|------------|---|---|
| <b>PRIMARY INDICATORS</b> |   |  |   |            |   |   |
| HC-P6                     | <b>Vaccination coverage in children</b>   | EU   | The percentage of infants reaching their 1st birthday in the given calendar year who have been fully vaccinated against pertussis (whooping cough), diphtheria, tetanus (DPT) and poliomyelitis.<br><br>and<br><br>the percentage of infants reaching their 2nd birthday in the given calendar year who have been fully vaccinated against measles, mumps and rubella (MMR) | None       | To measure effectiveness of care, one dimension of quality of care  | WHO: Health for all database  |
| HC-P7                     | <a href="#">Cervical cancer screening</a> | EU (NAT in 2008)                                 | The percentage of women aged 20-69 that were screened for cervical cancer using a cervical smear test over the past 3 years.  | None       | To measure effectiveness of care, one dimension of quality of care. | EHIS<br><br>(Member States not covered can use other national sources or other international sources) |

| Code                      | Commonly agreed indicator              | Type (EU indicator/<br>NAT – national indicator) | Definition  | Breakdowns | Comments  | Data source   |
|---------------------------|--|--|---|------------|---|---|
| <b>PRIMARY INDICATORS</b> |  |  |   |            |   |   |
| <b>HC-P8</b>              | <b>Cervical cancer survival rates</b>  | NAT  | The percentage of those still alive 5 years after the disease has been diagnosed compared to a non-diseased comparison group of similar age-structure (relative rates). | None       | To measure effectiveness of care, one dimension of quality of care.<br><br>ECHI data, international and national sources can be used. | ECHI information based on information provided by the international agency on research on cancer (IARC) |
| <b>HC-P9</b>              | <b>Colorectal cancer survival rate</b> | NAT  | The percentage of those still alive 5 years after the disease has been diagnosed compared to a non-diseased comparison group of similar age-structure (relative rates). | Gender     | To measure effectiveness of care, one dimension of quality of care.<br><br>ECHI data, international and national sources can be used. | ECHI information based on information provided by the international agency on research on cancer (IARC) |

| Code                        | Commonly agreed indicator                                | Type (EU indicator/<br>NAT – national indicator) | Definition  | Breakdowns | Comments   | Data source   |
|-----------------------------|--|--|---|------------|--|---|
| <b>SECONDARY INDICATORS</b> |  |  |   |            |  |   |
| HC-S4                       | <a href="#">Influenza vaccination for adults over 65</a> | EU (NAT in 2008)                                 | The percentage of those aged 65+ that have been vaccinated against influenza in the last year   | Gender     | To measure effectiveness of care, one dimension of quality of care.  | EHIS  |
| HC-S5                       | <a href="#">Breast cancer screening</a>                  | EU (NAT in 2008)                                 | The percentage of women aged 50-69 that were screened for breast cancer using a mammography over the past year  | None       | To measure effectiveness of care, one dimension of quality of care.  | EHIS  |
| HC-S6                       | <b>Breast cancer survival rate</b>                       | NAT  | The percentage of those still alive 5 years after the disease has been diagnosed compared to a non-diseased comparison group of similar age-structure (relative rates). | None       | To measure effectiveness of care, one dimension of quality of care.<br><br>ECHI, international and national sources can be used. | ECHI information based on information provided by the international agency on research on cancer (IARC) |
| HC-S7                       | <a href="#">Perinatal mortality</a>                      | NAT  | The number of foetal deaths (over 1 000 g) plus neonatal deaths (0-6 days) per 1 000 live births  | None       | To measure safety of care, one dimension of quality of care.   | Eurostat  |

### 6.3. Indicators regarding long-term sustainability of systems: expenditure and efficiency (3rd objective)

Data for the below indicators in the portfolio can be accessed on the link [Health and long term care](#) (including the more detailed breakdowns mentioned), or for overall figures using individual links in the table below.

| Code                      | Commonly agreed indicator                                    | Type (EU indicator/<br>NAT – national indicator) | Definition   | Breakdowns | Comments   | Data source  |
|---------------------------|--|--|--|------------|--|--|
| <b>PRIMARY INDICATORS</b> |  |  |  |            |  |  |
| HC-P10                    | <a href="#">Total health expenditure per capita</a>          | NAT  | Total health expenditure per capita in PPP   | None       | For Luxembourg to be computed as per person insured.<br><br>Use ESTAT SHA data if available; use OECD data if ESTAT SHA data not available and use WHO HFA database for MT and LV. | EUROSTAT based on system of health accounts (SHA) data |
| HC-P11                    | <a href="#">Total health care expenditure as % of GDP</a>    | NAT  | Total, public and private expenditure on health as % of GDP<br><br>(see definition of public and private expenditure next)   | None       | Use EUROSTAT SHA data if available; use OECD data if EUROSTAT SHA data not available and use WHO-HFA database for MT and LV.   | EUROSTAT based on SHA data                             |
| HC-P12                    | <a href="#">Total long-term care expenditure as % of GDP</a> | NAT  | Expenditure (as % of GDP) on long-term nursing care (category HC.3 in the SHA), plus expenditure with administration and provision of social services in kind to assist living with disease and impairment (category HC.R.6.1 in the SHA). | None       | Use EUROSTAT SHA data if available; use OECD data if EUROSTAT SHA data not available and use WHO-HFA database for MT and LV.   | EUROSTAT based on SHA data                             |

| Code                      | Commonly agreed indicator  | Type (EU indicator/<br>NAT – national indicator) | Definition   | Breakdowns | Comments   | Data source |
|---------------------------|--|--|--|------------|--|-------------|
| <b>PRIMARY INDICATORS</b> |  |  |  |            |  |             |
| HC- P13                   | <b>Projections of public expenditure on health care as % of GDP</b>    | NAT  | Age-related projections of health care, current level (as % of GDP) and projected change in share of GDP (in percentage points)    | None       | Specific assumptions agreed in the EPC. See “The 2005 EPC projections of age-related expenditures (2004-2050) for EU-25: underlying assumptions and projection methodologies”, revised in the 2009 EPC/EC Ageing Report. | EPC-AWG     |
| HC- P14                   | <b>Projections of public expenditure on long-term care as % of GDP</b> | NAT  | Age-related projections of long-term care, current level (as % of GDP) and projected change in share of GDP (in percentage points) | None       | Specific assumptions agreed in the EPC. See “The 2005 EPC projections of age-related expenditures (2004-2050) for EU-25: underlying assumptions and projection methodologies”, revised in the 2009 EPC/EC Ageing Report. | EPC-AWG     |
| HC- P15                   | <a href="#">Hospital inpatient discharges</a>                          | NAT  | Hospital inpatient discharges per 100 000 inhabitants  | None       | This indicator provides one measure of the output of the system and hence can be seen as a measure of the efficiency of the health care system.  | Eurostat    |
| HC- P16                   | <b>Hospital day-cases</b>  | NAT  | Hospital day-cases per 100 000 inhabitants   | None       | This indicator provides one measure of the output of the system and hence can be seen as a measure of the efficiency of the health care system.  | Eurostat    |

| Code                      | Commonly agreed indicator | Type (EU indicator/<br>NAT – national indicator) | Definition  | Breakdowns   | Comments                                    | Data source |
|---------------------------|---------------------------|--|---|--|---|-------------|
| <b>PRIMARY INDICATORS</b> |                           |  |   |  |   |             |
| HC- P17                   | <a href="#">Obesity</a>   | EU (NAT in 2008)                                 | The percentage of obese persons in the population i.e. the % of the population with BMI $\geq 30$ kg/m <sup>2</sup> | Gender<br><br>Age groups:<br>18-44;<br>45-54; 55-64; 65+;<br>75+; 18-64<br><br>Income quintile | To measure life-styles or healthy behaviour | EHIS        |

| Code                        | Commonly agreed indicator                       | Type (EU indicator/<br>NAT – national indicator) | Definition  | Breakdowns  | Comments  | Data source  |
|-----------------------------|---|--|---|---|---|--|
| <b>SECONDARY INDICATORS</b> |   |  |   |   |   |  |
| HC-S8                       | Sales of generics                               | NAT  | The percentage of generics sales in all prescribed medicine sales   | None  | This indicator provides one measure of the efficiency of the health care system.  | National sources   |
| HC-S9                       | Acute care bed occupancy rate                   | NAT  | The number of acute care beds effectively occupied in inpatient institutions divided by the number of available acute care beds and multiplied by 100 | None  | This indicator provides one measure of efficiency of the health care system.  | OECD health data and WHO-HFA database for non-OECD countries |
| HC-S10                      | <a href="#">Hospital average length of stay</a> | NAT  | Computed by dividing the number of days stayed in the hospital by the number of hospital discharges or deaths in hospital.                            | None  | This indicator provides one measure of the efficiency of the health care system. Member States may want to use this indicator together with a readmission rate (e.g. 28 days emergency readmission rate following ECHI) | Eurostat   |
| HC- S11                     | <a href="#">Regular smokers</a>                 | EU (NAT in 2008)                                 | The percentage of daily cigarette smokers in the population aged 15+  | Gender<br><br>Age groups:<br>18-44; 45-54; 55-64;<br>65+; 75+; 18-64<br><br>Income quintile | To measure life-styles or healthy behaviour.  | EHIS   |

| Code                        | Commonly agreed indicator  | Type (EU indicator/<br>NAT – national indicator) | Definition   | Breakdowns  | Comments                                     | Data source |
|-----------------------------|----------------------------|--|--|---|--|-------------|
| <b>SECONDARY INDICATORS</b> |                            |  |  |   |  |             |
| <b>HC- S12</b>              | <b>Alcohol consumption</b> | EU (NAT in 2008)                                 | The number of litres of pure alcohol per person per year | Gender<br><br>Age groups:<br>18-44; 45-54; 55-64;<br>65+; 75+; 18-64<br><br>Income quintile | To measure life-styles or healthy behaviour. | EHIS        |

## 6.4. Context information

| Code                       | Commonly agreed information item  | Type (EU/<br>NAT –<br>national) | Definition  | Breakdowns | Comments   | Data source                |
|----------------------------|---|---------------------------------|---|------------|--|----------------------------|
| <b>CONTEXT INFORMATION</b> |   |                                 |   |            |  |                            |
| HC-C1                      | <a href="#">Physicians</a>  | NAT                             | Total number of practising physicians per 100 000 inhabitants.  | None       | Member States may, if they wish, provide this information by health region as a proxy for geographical disparities of supply.<br><br>This can be used to look at staff needs for the whole country and the distribution of staff across the country. Time trends may also help us identify staff shortages due to migration. | Eurostat                   |
| HC-C2                      | <a href="#">Nurses and midwives</a>   | NAT                             | Total number of practising nurses and midwives per 100 000 inhabitants.   | None       | Member States may, if they wish, provide this information by health region as a proxy for geographical disparities of supply.<br><br>This can be used to look at staff needs for the whole country and the distribution of staff across the country. Time trends may also help us identify staff shortages due to migration. | Eurostat                   |
| HC-C3                      | <a href="#">Public and private expenditure as % of total health expenditure</a> | NAT                             | a) Total public expenditure which includes government spending HF.1.1 (central government HF.1.1.1, state/provincial government HF.1.1.2 and local/municipal government HF.1.1.3) plus social security funds HF.1.2 according to SHA. | None       | Use EUROSTAT SHA data if available; use OECD data if EUROSTAT SHA data not available and use WHO-HFA database for MT and LV.   | EUROSTAT based on SHA data |

| Code                       | Commonly agreed information item   | Type (EU/<br>NAT –<br>national) | Definition  | Breakdowns | Comments   | Data source           |
|----------------------------|--|---------------------------------|---|------------|--|-----------------------|
| <b>CONTEXT INFORMATION</b> |  |                                 |   |            |  |                       |
|                            |  |                                 | <p>b) Total private expenditure which includes private health insurance (private social insurance HF.2.1 + private insurance other than social insurance HF.2.2) plus private households out of pocket expenditure HF.2.3 plus non-profit institutions HF.2.4 and private corporations other than health insurance such as private companies funding occupational health care HF.2.5 according to SHA.</p> <p>c) Private health insurance expenditure HF.2.1 + HF.2.2</p> <p>d) Out-of-pocket payments expenditure HF.2.3</p> <p>as % of total health expenditure</p>   |            |  |                       |
| HC-C4                      | <a href="#">Total expenditure on main types of activities or functions of care</a> | NAT                             | <p>This means analysing the proportion of total current health care expenditure that is allocated to the following activities or functions of care:</p> <p>a) services of curative (HC.1) + b) services of rehabilitative care (HC.2) (together)</p> <p>c) ancillary services to health care (HC.4)</p> <p>d) medical goods dispensed to outpatients (HC.5)</p> <p>e) prevention and public health (HC.6)</p> <p>as % of total current health expenditure.</p> <p>This analysis is also to look at pharmaceutical expenditure in more detail by looking at expenditure on</p> <p>f) pharmaceuticals and other medical non-durables (HC.5.1)</p> <p>as % of total current health expenditure and as % of GDP</p> | None       | Use EUROSTAT SHA data if available; use OECD data if EUROSTAT SHA data not available and use WHO-HFA database for MT and LV. | EUROSTAT based on SHA |

## 7. THEMATIC PORTFOLIOS – INVESTING IN CHILDREN

The European Commission announced in 2010 its intention to adopt a Recommendation on Child Poverty in 2012. The initiative was endorsed by Member States through the June 2011 EPSCO Council conclusion on “Tackling Child Poverty and promoting Child Well-Being”, which called on the Social Protection Committee (SPC) to “actively contribute to the preparation of the Recommendation”.

The Council Conclusions of June 2011 invited the European Commission to put forward an EU Recommendation on child poverty and child well-being, “outlining common principles and *effective monitoring and assessment tools*.” Following a proposal from the European Commission, the SPC agreed in June 2011 to set up a specific Ad-hoc Group in charge of advising the Commission in developing the Recommendation, including the development of a detailed proposal for a portfolio of child specific indicators that could be part of the monitoring framework of the Recommendation. This work fed into the 2012 SPC Advisory Report on “[Tackling and Preventing Child Poverty, Promoting Child Well-being](#)”, with the proposed portfolio of indicators following the pillar approach adopted in defining the common principles of the Recommendation and corresponding to the broad topics addressed by each pillar as follows:

- *Overall objective of combating child poverty and social exclusion and promoting child well-being*
- *Access to adequate resources*
- *Access to quality services*

The final [Commission recommendation “Investing in children: breaking the cycle of disadvantage”](#) and the subsequent [Social Investment Package](#) stress the importance of early intervention and preventative approaches, and emphasize the importance of the framework provided by the portfolio of indicators for monitoring progress regarding investment in children.

## 7.1. Overall objective of combating child poverty and social exclusion and promoting child well-being

Data for the below indicators in the investing in children portfolio can be accessed on the link [Investing in children](#) (including the more detailed breakdowns mentioned), or for overall figures using individual links in the table below.

| Code                      | Commonly agreed indicator  | Type (EU indicator/ NAT – national indicator) | Definition  | Breakdowns   | Comments   | Data source        |
|---------------------------|--|---|---|--|--|--------------------|
| <b>PRIMARY INDICATORS</b> |  |   |   |  |  |                    |
| IC-P1                     | <a href="#">At-risk-of-poverty or social exclusion for children (0-17)</a> |   | The share of children (aged 0-17) who live in a household which is at risk of poverty and/or severely materially deprived and/or a (quasi-)jobless household (i.e. with very low work intensity)<br><br>(for the definition of these 3 indicators, see below)   | Age (0-17, 0-5, 6-11, 12-17)                       | Breakdown of the Europe 2020 poverty and social exclusion headline target.<br><br>Comparison with the working-age population (18-64) and the elderly population (65+) is recommended | Eurostat – EU-SILC |
| IC-P2                     | <a href="#">At-risk-of-poverty rate for children (0-17)</a>                |   | Share of children (aged 0-17) living in a household with an equivalised disposable income below 60% of the national median equivalised disposable income.<br><br>To be analysed together with the value of the poverty threshold in PPS for a household consisting of 2 adults and 2 children aged below 14)  | Age (0-17, 0-5, 6-11, 12-17)<br><br>Household type | Comparison with the working-age population (18-64) and the elderly population (65+) is recommended   | Eurostat – EU-SILC |
| IC-P3                     | <a href="#">Severe material deprivation rate for children (0-17)</a>       |   | Proportion of children (aged 0-17) who live in a household whose living conditions are severely constrained by a lack of resources, i.e. it experience at least 4 out of 9 of the following deprivation items: cannot afford (i) to pay rent or utility bills, (ii) to keep the home adequately warm, (iii) to pay unexpected expenses, (iv) to eat meat, fish or a protein equivalent every second day, (v) a week’s holiday away from home, (vi) a car, (vii) a washing machine, (viii) a colour TV, or (ix) a telephone. | Age (0-17, 0-5, 6-11, 12-17)                       | Comparison with the working-age population (18-64) and the elderly population (65+) is recommended   | Eurostat – EU-SILC |

| Code                      | Commonly agreed indicator   | Type (EU indicator/<br>NAT – national indicator) | Definition   | Breakdowns                   | Comments   | Data source        |
|---------------------------|---|--|--|------------------------------|--|--------------------|
| <b>PRIMARY INDICATORS</b> |   |  |  |                              |  |                    |
| IC-P4                     | <a href="#">Share of children (0-17) living in (quasi-)jobless households (i.e. very low work intensity households)</a> |  | Share of children (aged 0-17) living in a household where working-age adults (aged 18-59) have worked 20% or less of their total work potential during the past year (i.e. during the income reference period) | Age (0-17, 0-5, 6-11, 12-17) | Comparison with the working-age population (18-64) and the elderly population (65+) is recommended | Eurostat – EU-SILC |

| Code                        | Commonly agreed indicator   | Type (EU indicator/<br>NAT – national indicator) | Definition  | Breakdowns                   | Comments   | Data source        |
|-----------------------------|---|--|---|------------------------------|--|--------------------|
| <b>SECONDARY INDICATORS</b> |   |  |   |                              |  |                    |
| IC-S1                       | <a href="#">Dispersion of child poverty around the poverty risk threshold: at-risk-of poverty rate calculated with 50% and 70% thresholds</a> |  | Share of children (aged 0-17) living in a household with an equivalised disposable income below 50% and below 70% of the national equivalised median income                       | Age (0-17, 0-5, 6-11, 12-17) | Comparison with the working-age population (18-64) and the elderly population (65+) is recommended | Eurostat – EU-SILC |
| IC-S2                       | <a href="#">Persistent at-risk-of-poverty rate for children (0-17)</a>  |  | Share of children (0-17) living in a household with an equivalised disposable income below the poverty threshold in the current year and in at least two of the preceding 3 years |                              | Comparison with the working-age population (18-64) and the elderly population (65+) is recommended | Eurostat – EU-SILC |

| Code                       | Commonly agreed information item  | Type (EU/<br>NAT –<br>national) | Definition   | Breakdowns | Comments   | Data source        |
|----------------------------|---|---------------------------------|--|------------|--|--------------------|
| <b>CONTEXT INFORMATION</b> |   |                                 |  |            |  |                    |
| IC-C1                      | <a href="#">At-risk-of-poverty rate anchored at a fixed moment in time for children</a> |                                 | Share of children (0-17) living in households with an equivalised disposable income below 60% of the national median equivalised disposable income, where the threshold is anchored at a fixed moment in time (2008) |            | Comparison with the working-age population (18-64) and the elderly population (65+) is recommended | Eurostat – EU-SILC |

## 7.2. Access to adequate resources

Data for the below indicators in the investing in children portfolio can be accessed on the link [Investing in children](#) (including the more detailed breakdowns mentioned), or for overall figures using individual links in the table below.

| Code                      | Commonly agreed indicator  | Type (EU indicator/ NAT – national indicator) | Definition   | Breakdowns  | Comments   | Data source        |
|---------------------------|--|---|--|---|--|--------------------|
| <b>PRIMARY INDICATORS</b> |  |   |  |   |  |                    |
| IC-P5                     | <a href="#">In-work poverty rate of people living in households with dependent children</a>    |   | Share of individuals (with dependent children) who are defined as in work and have an income below the poverty threshold (60% of the national median equivalised disposable income)  | Age (0-17, 18-64, 0-64)<br>Household type (single parents, two adults with dependent children)                                  |  | Eurostat – EU-SILC |
| IC-P6                     | <a href="#">At-risk-of-poverty rate for children (0-17) by work intensity of the household</a> |   | Share of children (0-17) living in households with an equivalised disposable income below 60% of the national median equivalised disposable income according to the work intensity of the household  | Work intensity of the household (very high >0.85–1], high >0.55–0.85], medium >0.45–0.55] , low >0.2–0.45], very low [0 – 0.2]) |  | Eurostat – EU-SILC |
| IC-P7                     | <a href="#">At-risk-of-poverty rate for children (0-17) living in households at work</a>       |   | Share of children (0-17) living in households with an income below the poverty threshold (60% of the national median equivalised disposable income) and with a work intensity above 0.2, distinguishing between households working some >0.2-0.55] and a lot >0.55-1]. | Household type<br>Work intensity : >0.2, >0.2-0.55], >0.55-1]   |  | Eurostat – EU-SILC |
| IC-P8                     | <a href="#">Relative median poverty gap for children (0-17)</a>                                |   | Difference between the median equivalised income of persons below the at-risk-of poverty threshold and the at-risk-of poverty threshold, expressed as a percentage of the at-risk-of poverty threshold   | 0-17  | Comparison with the working-age population (18-64) and the elderly population (65+) is recommended | Eurostat – EU-SILC |

| Code                        | Commonly agreed indicator   | Type (EU indicator/<br>NAT – national indicator) | Definition  | Breakdowns  | Comments   | Data source        |
|-----------------------------|---|--|---|---|--|--------------------|
| <b>SECONDARY INDICATORS</b> |   |  |   |   |  |                    |
| IC-S3                       | <a href="#">Childcare</a>   |  | Children cared for (by formal arrangements <sup>(22)</sup> other than the family) as a proportion of all children in the same age group   | Less than 3 years, between 3 years and mandatory school age; less than 30h, 30h or more a week        | Relevance of breakdown by income quintile to be assessed   | Eurostat – EU-SILC |
| IC-S4                       | <b>Impact of social transfers (other than pensions) in reducing child poverty</b> |  | Difference between the children at-risk-of poverty rate before and after social transfers (excluding pensions)  |   | Comparison with the working-age population (18-64) and the elderly population (65+) is recommended | Eurostat – EU-SILC |
| IC-S5                       | <a href="#">Housing cost overburden rate (0-17)</a>                               |  | Percentage of the population living in a household where total housing costs (net of housing allowances) represent more than 40% of the total disposable household income (net of housing allowances) | Age (0-17, 0-5, 6-11, 12-17)<br><br>Poverty status (above or below the at-risk-of- poverty threshold) | Comparison with the working-age population (18-64) and the elderly population (65+) is recommended | Eurostat – EU-SILC |

<sup>(22)</sup> Formal arrangements are defined as the following services: pre-school or equivalent, compulsory education, centre-based services outside school hours, a collective crèche or another day-care centre, including family day-care and professional certified child-minders. The care provided by family members, neighbours or non-certified child-minders is therefore not included under this definition of ‘formal arrangements’.

| Code                       | Commonly agreed information item                         | Type (EU/<br>NAT –<br>national) | Definition   | Breakdowns       | Comments   | Data source    |
|----------------------------|--|---------------------------------|--|------------------|--|----------------|
| <b>CONTEXT INFORMATION</b> |  |                                 |  |                  |  |                |
| <b>IC-C2</b>               | <b>Employment impact of parenthood</b>                   |                                 | Difference in percentage points (pp) between<br>– employment rate of people aged 20-49 living in households in which there are no children aged 0-6 and<br>– employment rate of people aged 20-49 living in households in which there is at least one child aged 0-6 | Total, by gender | Looking at children aged 0-3 and 3-6 separately is recommended | Eurostat – LFS |
| <b>IC-C3</b>               | <b>Part time employment due to care responsibilities</b> |                                 | Persons employed part-time because of looking after children or incapacitated adults, as a percentage of total employed persons  | Total, by gender |  | Eurostat – LFS |

### 7.3. Access to quality services

Data for the below indicators in the investing in children portfolio can be accessed on the link [Investing in children](#) (including the more detailed breakdowns mentioned), or for overall figures using individual links in the table below.

| Code                      | Commonly agreed indicator   | Type (EU indicator/ NAT – national indicator) | Definition  | Breakdowns  | Comments   | Data source                 |
|---------------------------|---|---|---|---|--|-----------------------------|
| <b>PRIMARY INDICATORS</b> |   |   |   |   |  |                             |
| IC-P9                     | <a href="#">Early school education</a>  |   | Share of children between age 4 and the start of compulsory education who participate in early childhood education    | By gender   |  | UOE <sup>(23)</sup>         |
| IC-P10                    | <b>Proficiency in reading, maths and science</b>  |   | Share of 15-year olds who score 1 or below (on a scale from 1 (lowest) to 5 (highest)) in PISA tests                  | By parental background (educational attainment, country of birth) | No data for CY and MT are available in current data collections. | OECD – PISA <sup>(24)</sup> |
| IC-P11                    | <a href="#">Young people not in employment, education or training (NEET) rate (15-19)</a> |   | Young people not in employment, education or training (NEET) rate   | By gender, 15-19  |  | Eurostat – LFS              |
| IC-P12                    | <a href="#">Self-reported unmet need for medical care (16-24)</a>                         |   | Proportion of people aged 16-24 reporting not having accessed medical services due to cost, distance or waiting lists |   |  | Eurostat – EU-SILC          |

<sup>(23)</sup> UNESCO/OECD/EUROSTAT database on education statistics.

<sup>(24)</sup> [www.oecd.org/pisa/aboutpisa/](http://www.oecd.org/pisa/aboutpisa/)

| Code                      | Commonly agreed indicator                | Type (EU indicator/<br>NAT – national indicator) | Definition   | Breakdowns  | Comments | Data source        |
|---------------------------|--|--|--|---|----------|--------------------|
| <b>PRIMARY INDICATORS</b> |  |  |  |   |          |                    |
| IC-P13                    | <a href="#">Infant mortality</a>         |  | Ratio of the number of deaths of children under one year of age during the year to the number of live births in that year (expressed per 1 000 live births)  | By SES of parents (under development)   |          | Eurostat           |
| IC-P14                    | <b>Child mortality 1-14 years</b>        |  | Death rate per 100 000 population  |   |          | Eurostat           |
| IC-P15                    | <b>Low birth weight</b>                  |  | Weight at birth of less than 2 500 grams (5.5 pounds)  |   |          | WHO – OECD         |
| IC-P16                    | <b>Housing deprivation (0-17)</b>        |  | Percentage of the population deprived of each housing deprivation item. The items considered are:<br><br><a href="#">(1) leaking roof, damp walls/floors/foundation, or rot in window frames or floor;</a><br><a href="#">(2) lack of bath or shower in the dwelling;</a><br><a href="#">(3) lack of indoor flushing toilet for sole use of the household;</a><br><a href="#">(4) problems with the dwelling: too dark, not enough light</a> | By age (0-17, 0-5, 6-11, 12-17)<br><br>By at-risk-of-poverty status (i.e. above or below the threshold) |          | Eurostat – EU-SILC |
| IC-P17                    | <a href="#">Overcrowding rate (0-17)</a> |  | Percentage of the population living in an overcrowded household. A person is considered to be living in an overcrowded household if the household does not have at its disposal a minimum number of rooms equal to:<br><br>— one room for the household;<br>— one room for each couple;<br>— one room for each single person aged 18+;   | By age (0-17, 0-5, 6-11, 12-17)<br><br>By at-risk-of-poverty status (above or below the threshold)      |          | Eurostat – EU-SILC |

| Code                      | Commonly agreed indicator | Type (EU indicator/<br>NAT – national indicator) | Definition   | Breakdowns | Comments | Data source |
|---------------------------|---------------------------|--|--|------------|----------|-------------|
| <b>PRIMARY INDICATORS</b> |                           |  |  |            |          |             |
|                           |                           |  | <ul style="list-style-type: none"> <li>– one room for two single people of the same sex between 12 and 17 years of age;</li> <li>– one room for each single person of different sex between 12 and 17 years of age;</li> <li>– one room for two people under 12 years of age.</li> </ul> |            |          |             |

| Code                        | Commonly agreed indicator   | Type (EU indicator/<br>NAT – national indicator) | Definition  | Breakdowns  | Comments | Data source    |
|-----------------------------|---|--|---|---|----------|----------------|
| <b>SECONDARY INDICATORS</b> |   |  |   |   |          |                |
| IC-S6                       | <a href="#">Early leavers from education and training (18-24)</a> |  | Population aged 18-24 years with lower secondary education at most and not in further education or training | By gender<br>By highest educational level completed |          | Eurostat – LFS |

| Code                       | Commonly agreed information item                        | Type (EU/<br>NAT –<br>national) | Definition   | Breakdowns                     | Comments | Data source                           |
|----------------------------|---|---------------------------------|--|--------------------------------|----------|---------------------------------------|
| <b>CONTEXT INFORMATION</b> |   |                                 |  |                                |          |                                       |
| IC-C4                      | <b>Vaccination coverage</b>                             |                                 | The percentage of infants who, on reaching their 1st birthday in the given calendar year, have been fully vaccinated against pertussis (whooping cough), diphtheria, tetanus (DPT) and poliomyelitis. And % of infants who, on reaching their 2nd birthday in the given calendar year, have been fully vaccinated against measles, mumps and rubella (MMR) |                                |          | WHO                                   |
| IC-C5                      | <b>Obesity</b>  |                                 | Young people aged 15-24 with a body mass index of 30 or above  | By gender<br>By SES of parents |          | Eurostat – EHIS                       |
| IC-C6                      | <a href="#">Regular smokers</a>                         |                                 | Share of daily cigarette smokers in the population aged 15-24  | By gender<br>By SES of parents |          | Eurostat – EHIS                       |
| IC-C7                      | <a href="#">Causes of death of young people-suicide</a> |                                 | Deaths caused by suicide per 100 000 inhabitants aged 15-24  | By gender                      |          | Eurostat – Causes of death statistics |

## 8. FURTHER DEVELOPMENT OF THE PORTFOLIO OF INDICATORS

The present portfolio document reflects the current situation (i.e. in 2015) regarding commonly agreed indicators for the monitoring of progress towards the EU objectives for Social Protection and Social Inclusion. The list of indicators is continuously being improved as statistics, data collection and policy needs evolve. In this context, the SPC ISG has already identified areas where further indicator development is needed, and which could lead to the future inclusion of other indicators in the current list.

### **Europe 2020 poverty and social exclusion target**

- Revision of the basis for measuring material deprivation in the EU, leading to an improved indicator of severe material deprivation

### **Social inclusion**

The following indicators are subject to further development and possible subsequent inclusion in the social inclusion portfolio:

- Child deprivation indicator – to be developed and adopted on the basis of the work and proposal by Guio, Gordon and Marlier (2012) <sup>(25)</sup> and the data collection through EU-SILC (2014 thematic module). The indicator will fill in the space reserved for a child well-being indicator (to be potentially complemented in the future with other indicators describing child well-being);
- Benefits coverage;
- Average benefits relative to the at-risk-of-poverty threshold after 6 months/12 months/2 years (to be decided) of unemployment (total and by household type) – to be developed in the context of the Joint Assessment Framework policy area 4.1;
- At-risk-of-poverty rate for households in which income is mainly from social benefits – to be developed in the context of the Joint Assessment Framework policy area 11;
- Further improvement of the housing deprivation indicator, including through enlarging the list of items which form its basis in order to arrive at a more statistically robust measure;
- Indicators for monitoring better developments in the income situation in the different parts of the income distribution;
- Indicators which give a better view of the dynamic aspects of the social situation, such as indicators on transitions, persistence and recurrence, making greater use of the longitudinal component of EU-SILC.

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<sup>(25)</sup> Guio, Gordon and Marlier (2012), Measuring material deprivation in the EU: Indicators for the whole population and child-specific indicators, Eurostat Methodologies and working papers, Luxembourg: Office for Official Publications of the European Communities (OPOCE).

## **Pensions**

The ISG has agreed to consider developing other indicators which would cover the following dimensions of pensions and could potentially be considered for subsequent inclusion in the portfolio:

- Material deprivation of older people (regarding the first streamlined objective for pensions);
- Age of entry into the labour market (regarding the first streamlined objective for pensions);
- Coverage rate of public statutory pension schemes and private pensions (as a percentage of the working age population and active population) (regarding the first streamlined objective for pensions);
- Financial incentives to work longer (regarding the first two streamlined objectives for pensions);
- Administrative costs of private pensions (regarding the second streamlined objective for pensions);
- Assets in all pension schemes (statutory and occupational, including reserve funds), current and projected (as percentage of GDP) up to 2050 (regarding the second streamlined objective for pensions);
- Past ten years performance on pension funds (average and standard deviation) (regarding the second streamlined objective for pensions);
- Share of active population having access to information on their individual pension entitlements (regarding the third streamlined objective for pensions);
- Average typical length of vesting/waiting periods (regarding the third streamlined objective for pensions);
- Replacement rates associated with non-standard careers (career breaks, succession of several pension schemes) (regarding the third streamlined objective for pensions);
- Number of pension beneficiaries;
- Aggregate replacement ratio calculated with longitudinal data;
- Further developments associated with theoretical prospective replacement rates;
- Gender pensions gap (gender aspects of pension adequacy).

## **Health and long term care**

The existing list of indicators under the health strand will be reviewed against ongoing statistical and indicator developments, especially the renewed incentive for the development of further indicators in this area arising from the establishment of a Joint Assessment Framework for Health. Similarly, long-term care is becoming a growing field of interest which may not be fully reflected in the current set of indicators, mainly because of the lack of international and comparable data. Hence, the list may be adapted or supplemented by other indicators covering dimensions such as the following:

- Mortality, life expectancy and healthy life years by socio-economic status (related to health inequalities);
- Care utilisation including the probability of using various types of care and the number of visits or inpatient/day patient days notably by socio-economic status (related to access to care and inequity of access);
- Out-of-pocket payments by households (related to access to care and inequity of access);

- Preventable/Avoidable mortality (related to health inequalities and also quality of care);
- Amenable mortality;
- Potential years of life lost;
- Colorectal cancer screening (related to quality of care notably effectiveness of care);
- Diabetes screening and control (related to quality of care notably effectiveness of care);
- Asthma care (related to quality of care notably effectiveness of care);
- Infections acquired in the course of medical care (related to quality of care notably safety of care);
- Fruit and vegetable consumption;
- Physical activity (related to long-term sustainability notably health promotion and disease prevention);
- Mental health (related to long-term sustainability notably health promotion and disease prevention);
- Well-being;
- Long-term care including statistics regarding provision and dependency rates, and building on the proposals for data and indicators' development identified in the EC-SPC 2014 report on "Adequate social protection for long-term care needs in an ageing society".

### **Investing in children**

- Child deprivation indicator (as described above under the social inclusion list);
- Mental health of young people – young people (15-24) with depressive syndrome;

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This publication reflects the 2015 update of the portfolio of EU social indicators as developed by the Social Protection Committee and especially its Indicators Sub-Group. The indicators aim at monitoring progress towards the EU objectives for social protection and social inclusion. In addition to a list of overarching indicators, four sets of indicators focus on specific topics: social inclusion, pensions, healthcare and long-term care, and child poverty and wellbeing. The lists are continuously being improved as statistics, data collection and policy needs evolve. The indicators are an essential tool to assess the social challenges facing EU countries, identify social trends to watch and support Member States reporting on social policies.

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