

# 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



2022 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  
2022 UPDATE<sup>1</sup>**

Manuscript completed in November 2022

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<sup>1</sup> A broader review of the existing indicator sets per portfolio strand will be conducted in 2023, in view of possibly including other indicators or dropping some existing ones as appropriate, leading to a further update next year.

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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 have been and are being 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](#) (including the 2020 EU poverty and social exclusion target<sup>2</sup>) up until 2020, and, since 2021, the European Pillar of Social Rights<sup>3</sup> and its Action Plan<sup>4</sup> for implementation, including the monitoring of progress towards the 2030 EU poverty and social exclusion target of a reduction of the number of people at risk of poverty or social exclusion by at least 15 million by 2030, of which at least 5 million children<sup>5</sup>. 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

### 1.1.1. *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 that 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 evolved slightly 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>6</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;

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<sup>2</sup> The 2020 EU poverty and social exclusion target agreed upon in 2010 consisted of reducing the number of people at risk of poverty or social exclusion in the EU by at least 20 million by 2020. For an assessment of the Europe 2020 Strategy, including of this target and the 2020 employment targets, see [joint report by the Employment Committee \(EMCO\) and the Social Protection Committee \(SPC\)](#) produced in 2019.

<sup>3</sup> The [European Pillar of Social Rights](#) was proclaimed at the Gothenburg Summit for fair jobs and growth in 2017 and provides a compass to guide towards a strong Social Europe and sets the vision for a “social rulebook”. The [20 principles](#) of the European Pillar of Social Rights are the beacon guiding us towards a strong social Europe that is fair, inclusive and full of opportunity.

<sup>4</sup> The [Action Plan](#) on the European Pillar of Social Rights sets out concrete initiatives to turn the European Pillar of Social Rights into reality. It proposes headline targets for the EU by 2030.

<sup>5</sup> It should be noted that the definition of the at-risk-of-poverty-or-social-exclusion indicator used for the 2030 target is not the same as that used for the 2020 target. See below, Section 1.1.3.

<sup>6</sup> See SPC opinion on "[Reinvigorating the social OMC in the context of the Europe 2020 Strategy](#)".

- 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, and, since 2021, with the objectives of the Action Plan on the European Pillar of Social Rights which aims at ensuring that the European social model is fit for the challenges of the 21<sup>st</sup> century, through supporting fair and well-functioning labour markets and welfare systems;
- 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;
- 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.

A thematic portfolio on “Investing in children” was added to take account of the 2012 SPC Advisory Report on [“Tackling and Preventing Child Poverty, Promoting Child Well-being”](#). This portfolio of child-specific indicators is part of the monitoring framework of the [Commission Recommendation “Investing in children: breaking the cycle of disadvantage”](#), which emphasises the importance of monitoring progress regarding investment in children. In 2021 the [Council Recommendation establishing a European Child Guarantee](#) (ECG) added further importance to the monitoring of the situation of children, and in 2022 the ISG worked on indicators for the monitoring of the ECG National Action Plans.

The regular reporting by Member States covers policies and measures under these various EU social objectives, with a multiannual perspective. It has been organised so as to ensure synergies with the Europe 2020 policy cycle up until 2020 as well as with the European Semester<sup>7</sup> and, since 2021, with the implementation of the Action Plan on the European Pillar of Social Rights (see below) and related national reporting requirements.

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

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

Concretely, under the strategy the Union set five ambitious objectives - on employment, innovation, education, social inclusion and climate/energy - to be reached by 2020. These included 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>8</sup>). This target was one of three integrated objectives (along with employment and education) which were 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) was 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<sup>9</sup>. It reflected the multiple facets of poverty

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<sup>7</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 coordination. 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.

<sup>8</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.

<sup>9</sup> Below are the definitions of the AROPE, severe material deprivation and the share of people living in (quasi-)jobless households indicators as used under the Europe 2020 Strategy:

- *AROPE*: Share of persons who are at-risk-of-poverty (according to the standard 60% median EU definition) and/or severely materially deprived and/or living in (quasi-)jobless households (i.e. households with very low work intensity). 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.
- *Severe material deprivation*: 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.
- *Share of people aged 0-59 living in (quasi-)jobless households* where on average working-age adults (aged 18-59) work 20% or less of their total work potential during the past year.



and exclusion across Europe and extended 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 allowed to take account of the diversity of situations and priorities across the EU.

### **1.1.3. *The European Pillar of Social Rights and implementation of its Action Plan, including the poverty and social exclusion target for 2030***

At the Gothenburg Summit for fair jobs and growth in 2017, the European Parliament, the Council of the EU and the European Commission proclaimed the European Pillar of Social Rights (EPSR). The EPSR provides a compass to guide towards a strong Social Europe and sets the vision for a “social rulebook”. It focuses on employment and social aspects and ensuring that the European social model is fit for the challenges of the 21<sup>st</sup> century, through supporting fair and well-functioning labour markets and welfare systems.

The EPSR sets out 20 principles, divided into three categories: equal opportunities and access to the labour market, dynamic labour markets and fair working conditions, and public support/social protection and inclusion. It is accompanied by a Social Scoreboard, to track Member States’ trends and performances, enabling to monitor progress towards the implementation of the Social Pillar principles as part of the well-established policy coordination framework in the context of the European Semester.

On 4 March 2021, the European Commission published its Communication on the European Pillar of Social Rights Action Plan<sup>10</sup>, outlining concrete actions to further implement the Pillar principles<sup>11</sup> as a joint effort by the Member States and the EU. The Commission proposed three EU headline targets to be achieved by the end of the decade in the areas of employment, skills, and social protection, which were welcomed by the European Council at the Porto Summit in May 2021. These again included a target on fighting poverty and social exclusion, namely that the number of people at risk of poverty or social exclusion should be reduced by at least 15 million by 2030 (and among which at least 5 million should be children).

The Action Plan for implementation of the European Pillar of Social Rights (EPSR) sets the backdrop for monitoring of the social situation under the European Semester, along with the targets on poverty and social exclusion for 2030. It also included a proposal to revise the EPSR Social Scoreboard, through updating the existing set of indicators so as to allow to track progress in the implementation of the Pillar in a more comprehensive manner. Following the [opinion of the Employment Committee and the SPC](#), a revised Social Scoreboard<sup>12</sup>, containing only headline indicators, was duly endorsed by the Council in 2021 for use in the Joint Employment Report under the European Semester.

The indicator that is the basis for monitoring progress against the poverty and social exclusion target, the at-risk-of-poverty-or-social-exclusion rate (AROPE), has been revised as compared to the one used to monitor progress against the Europe 2020 target<sup>13</sup>. This involved revising two of the three components of the indicator: the severe material deprivation (SMD) and the (quasi-)jobless households components, while keeping the component on at-risk-of-poverty (AROP) unchanged. The modifications were to use the indicator of severe material and social deprivation (SMSD) to replace the severe material deprivation component, and to extend the age bracket of the (quasi-)jobless household indicator from 59 to 64 years, while making some adjustments to the reference population so as not to include retired persons. Since 2021, these revised definitions of the above components are used in the overall AROPE indicator in order to measure progress towards the 2030 headline target on poverty and social exclusion.

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<sup>10</sup> ST 6649/21 + ADD 1-2.

<sup>11</sup> <https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX%3A32017C1213%2801%29>

<sup>12</sup> For the list of indicators in the revised Social Scoreboard see page 26 of the [“Proposal for a Joint Employment Report 2022”](#).

<sup>13</sup> For further details on the revision of the at-risk-of-poverty-or-social-exclusion (AROPE) indicator, see page 21 of the [2021 SPC Annual review of the Social Protection Performance Monitor \(SPPM\) and developments in social protection policies](#).

## 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 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 regard to the 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 progress towards the 2030 headline target on poverty and social exclusion (and sub-target related to children);
- monitoring progress towards the implementation of the Social Pillar principles in the context of the European Semester, via the Joint Employment Report and its assessment of the headline indicators in the Social Scoreboard;
- preparing the [European Semester](#) (including the [National Reform Programmes](#)<sup>14</sup>) and providing evidence for assessing specific social challenges facing EU countries through [the Joint Assessment Framework](#)<sup>15</sup>;
- identifying the key social trends to watch across the EU through the [Social Protection Performance Monitor \(SPPM\)](#), 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 and country-specific/thematic reviews;

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<sup>14</sup> From the link page click on a country to access the National Reform Programme

<sup>15</sup> The Joint Assessment Framework developed jointly by the European Commission, SPC and the Employment Committee (EMCO), is an analytical tool to underpin evidence-based policy making and to support the identification of key employment and social challenges and help Member States establish their priorities. Further details can be found on the [ISG webpage on monitoring tools](#).

- 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 the European strategy for the decade to 2030;
- for thematic reports on relevant topics such as [Pensions adequacy in the EU](#), [Long-term Care in the EU](#), [Child poverty and well-being](#) and the [European Child Guarantee](#), and on [access to social protection for workers and the self-employed](#), as well as supporting the [related monitoring frameworks adopted by the SPC in these areas](#). 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 the commonly agreed indicators and context information are calculated and regularly updated by Eurostat on the basis of commonly agreed definitions/methodologies and are made available via the [Eurostat web-site](#). More details on the definitions of indicators, their calculation and other related details, as well as technical fiches where these are available, can be accessed through the [online EU social indicators dataset](#) on the ISG website.

## 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>16</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:

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<sup>16</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.)

- **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).
- **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.

The ISG has also developed guidelines for the use of indicators/information which do not yet meet the quality criteria of the EU Social Indicators Portfolio, but which are useful to respond to urgent/new policy needs (e.g. on work-life balance, homelessness etc.) while maintaining certain quality standards. Indicators/information agreed for use in this context are not included in this portfolio document.

### 3. BREAKDOWNS OF THE INDICATORS IN THE PORTFOLIO

The lists of breakdowns of the indicators in the portfolio, in particular those coming from the same source, have been revised in October 2022 with a view to having a more harmonised approach and making them more consistent. In this context, the breakdowns for many indicators reflect the use of two standard lists of breakdowns, a "short one" (concerning "primary breakdowns" applicable in general to most primary EU-SILC indicators as relevant) and a "long one" (with further non-short list breakdowns applicable to selected key indicators to show further "secondary breakdowns" for those indicators), which could then be amended/completed as appropriate. The breakdowns included in the short and long lists are as follows:

#### *Short list*

- Age:
  - For EU-SILC: 0-17 (0-5; 6-11; 12-17 [if meaningful and statistically reliable]), 18-64, 65+
  - For LFS: 15-24, 25-54, 55-59, 60-64, 55-64
  - And also, where appropriate (in line with the renewed youth guarantee), for both EU-SILC and LFS: 0-15, 15-24/25-29/15-29 + 30-64 for LFS and 16-24/25-29/16-29 + 30-64 for EU-SILC
- Gender



- Household type
  - *Households with no dependent children*: All households without dependent children; single person; two adults; three or more adults without dependent children
  - *Households with dependent children*: All households with dependent children; single parent with dependent children; two adults, one dependent child; two adults, two dependent children; two adults, three or more dependent children; three or more adults with dependent children
- AROP/non-AROP status
- Most frequent activity status (population aged 16 and over); Employed, not employed, unemployed, retired, other outside labour force (inactive)

#### Long list

- Age:
  - For EU-SILC: 0-17 (0-5; 6-11; 12-17 [if meaningful and statistically reliable]), 18-64, 65+
  - For LFS: 15-24, 25-54, 55-59, 60-64, 55-64
  - And also, where appropriate (in line with the renewed youth guarantee), for both EU-SILC and LFS: 0-15, 15-24/25-29/15-29 + 30-64 for LFS and 16-24/25-29/16-29 + 30-64 for EU-SILC
- Gender
- Household type
  - Households with no dependent children: All households without dependent children; single person; single person under 65 years old; single person, 65 years and over; single women; single men; two adults; two adults, at least one person 65 years and over; two adults, both under 65 years; three or more adults without dependent children
  - Households with dependent children: All households with dependent children; single parent, 1 or more dependent children; two adults, one dependent child; two adults, two dependent children; two adults, three or more dependent children; three or more adults with dependent children
- AROP/non-AROP status
- Most frequent activity status (population aged 16 and over); Employed, employee, employed persons except employees, not employed, unemployed, retired, other outside labour force (inactive)
- Tenure status (total, owner with mortgage or loan, owner with no outstanding mortgage or housing loan, tenant with rent at market price, tenant with rent at reduced price or free)
- Income quintiles
- Work intensity of the household (0-0.2 (very low work intensity) and 0.2-1 (not very low work intensity), and where relevant 0.2-0.45, 0.45-0.55, 0.55-0.85, 0.85-1)
- NUTS regions (NUTS1, and also NUTS2 if reliable and available)
- Degree of urbanisation (densely-populated area (cities), intermediate urbanised area (towns and suburbs) and thinly-populated area)
- Part-time/full-time contract (for the monitoring of the 2019 Council Recommendation on “Access to social protection for workers and the self-employed”) (population aged 16 and over)
- Temporary/permanent contract (for the monitoring of the 2019 Council Recommendation on “Access to social protection for workers and the self-employed”) (population aged 16 and over)

- Educational attainment level (population aged 16 and over): total, low (less than primary, primary and lower secondary education (ISCED levels 0-2), medium (upper secondary and post-secondary non-tertiary education (ISCED levels 3 and 4), high (tertiary education (ISCED levels 5-8)
- Broad group of citizenship – reporting country, foreign country (distinguishing between EU-27 and non-EU) (population aged 16 and over)
- Broad group of country of birth– reporting country, foreign country (distinguishing between EU-27 and non-EU) (population aged 16 and over)
- For children aged 0-15 in EU-SILC: breakdown by age and educational attainment level of their parents

The breakdowns already forming the short list are highlighted in the long list, with some (household type and activity status) having a greater list of breakdown categories in the long list. The non-highlighted breakdowns will be included **as appropriate** as a secondary set - i.e. depending on the indicator (the breakdown has to be meaningful for the indicator focus) and the statistical robustness of the breakdown (see below). In the tables of indicators that follow in sections 4 to 8 of this document, the reference to “short list” or “long list” reflects the above lists of breakdowns, with any further/amended breakdowns shown as appropriate.

For AROPE and its three components as well as for the “standard” MSD indicator, use is made of the longer list of breakdowns (adjusted as appropriate for the indicator focus). Other indicators where the long list is used include: AROP before transfers (with “pensions” included in the original income), anchored AROP, housing cost overburden, housing deprivation, overcrowding, unmet medical needs, unmet dental needs, self-reported limitations in daily activities.

As is the case now, even though the breakdowns included in the short list are those that will be used more frequently, the secondary breakdowns are to complement the analysis of the primary breakdowns.

**IMPORTANT:** Caution will be applied with regard to the statistical robustness of the proposed breakdowns in both the short and long lists. For each indicator, a given breakdown will be provided only if the sample size is sufficient.

## 4. 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, and, since 2021, with the objectives of the Action Plan on the European Pillar of Social Rights which aims at ensuring that the European social model is fit for the challenges of the 21<sup>st</sup> century, through supporting fair and well-functioning labour markets and welfare systems;
- 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 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

## 4.1 Overarching indicators

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.

code	Key dimension	Commonly agreed indicator	Type (EU indicator/ NAT - national indicator)	Definition	Breakdowns	Comments	data source
1	<b>2030 headline indicator - AROPE</b>  Risk of poverty or social exclusion	<a href="#">At risk of poverty or social exclusion rate (revised definition)</a>	EU	Share of persons who are at-risk-of-poverty and/or severely materially and socially deprived and/or living in (quasi-)jobless households (i.e. households with very low work intensity).  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.	Long list	Indicator used to assess progress towards the 2030 target in the EPSR Action Plan of a reduction in the population at risk of poverty or social exclusion by at least 15 million compared to the reference year 2019.	Eurostat - EU SILC
1a	<b>(AROE Component)</b>  Risk of poverty	<b>At-risk-of poverty rate</b>  <b>+ illustrative threshold values</b>	EU	Share of persons aged 0+ with an equivalised disposable income below 60% of the national equivalised median income <sup>17</sup> .  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)	Long list	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>18</sup> ) of this threshold.	Eurostat - EU SILC

<sup>17</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>18</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).



code	Key dimension	Commonly agreed indicator	Type (EU indicator/ NAT - national indicator)	Definition	Breakdowns	Comments	data source
1b	(AROE Component)  (Quasi-) Jobless households	Population living in (quasi-)jobless households (revised definition)	EU	Share of people aged 0-64 living in (quasi-) jobless households (i.e. households with <a href="#">very low work intensity</a> <sup>19</sup> ), where on average working-age adults (aged 18-64) work 20% or less of their total work potential during the past year.	Long list		Eurostat - EU SILC
1c	(AROE Component)  Severe material and social deprivation	<a href="#">Severe material and social deprivation rate</a>	EU	<p>Share of population living in households lacking at least 7 items out of the following 13 items:</p> <p><i>Households items:</i></p> <p>1. Ability to face unexpected expenses; 2. Afford one week annual holiday away from home; 3. Avoid arrears (in mortgage rent, utility bills and/or hire purchase instalments); 4. Afford a meal with meat, chicken, fish or vegetarian equivalent every second day; 5. Afford keeping their home adequately warm; 6. Have access to a car/van for personal use; 7. Afford replacing worn-out furniture</p> <p><i>Personal items:</i></p> <p>8. Have access to an internet connection 9. Afford replacing worn-out clothes by some new ones 10. Afford having two pairs of properly fitting shoes (including a pair of all-weather shoes) 11. Afford spending a small amount of money each week on him/herself</p>	Long list	<p>Only people lacking an item for affordability reasons (i.e. “enforced lack” - not lack by choice or due to any other reasons) are considered deprived of this item.</p> <p>Seven out of the 13 deprivation items included in the new indicator are collected at the household level and are thus assumed to apply equally to all household members. The remaining six items are collected at the individual level: they are collected only for people aged 16 or over and have therefore to be “distributed” to children below 16. The rule applied for this distribution is the following: “if at least half the</p>	Eurostat - EU SILC

<sup>19</sup> Work intensity is the ratio between the number of months that household members of working age (persons aged 18–64 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/ NAT - national indicator)	Definition	Breakdowns	Comments	data source
				12. Afford having regular leisure activities 13. Afford getting together with friends/family for a drink/meal at least once a month		number of adults for which the information is available in the household lack an item, then the children living in that household are considered as deprived from that item.	
<b>2</b>	<b>2030 complementary goal – AROPE of children</b>  Risk of poverty or social exclusion for children	<b>At risk of poverty or social exclusion rate of children (revised definition)</b>	EU	Share of children aged 0-17 who are at-risk-of-poverty and/or severely materially and socially deprived and/or living in (quasi-)jobless households (i.e. households with very low work intensity).  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.	Long list	Indicator used to assess the complementary goal of the 2030 target in the EPSR Action Plan of a reduction in the child population at risk of poverty or social exclusion, which requires that out of the 15 million people to lift out of poverty or social exclusion, at least 5 million should be children	Eurostat - EU SILC
<b>2a</b>	<b>(Child AROPE Component)</b>  Risk of poverty for children	<b>At-risk-of poverty rate of children</b>  <b>+ illustrative threshold values</b>	EU	Share of children aged 0-17 with an equivalised disposable income below 60% of the national equivalised median income.	Long list	For each country, the poverty risk indicator must be assessed by looking at both the share of children whose income is below the threshold and the comparative level (in PPS) of this threshold.	Eurostat - EU SILC
<b>2b</b>	<b>(Child AROPE Component)</b>  Children in (Quasi-) Jobless households	<b>Child population living in (quasi-) jobless households (revised definition)</b>	EU	Share of children aged 0-17 living in (quasi-) jobless households (i.e. households with <a href="#">very low work intensity</a> ), where on average working-age adults (aged 18-64) work 20% or less of their total work potential during the past year.	Long list		Eurostat - EU SILC

code	Key dimension	Commonly agreed indicator	Type (EU indicator/ NAT - national indicator)	Definition	Breakdowns	Comments	data source
2c	<b>(Child AROPE Component)</b>  Severe material and social deprivation for children	<a href="#">Severe material and social deprivation rate</a>	EU	Share of children aged 0-17 living in households lacking at least 7 items out of the 13 deprivation items (see 1c above)	Long list	Only people lacking an item for affordability reasons (i.e. “enforced lack” - not lack by choice or due to any other reasons) are considered deprived of this item.  (See also 1c above)	Eurostat - EU SILC
3	<b>Intensity of poverty risk</b>	<b>Relative median poverty risk gap</b>	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.	Short list		Eurostat - EU SILC
4	<b>Income inequalities</b>	<b>Income quintile ratio (S80/S20)</b>	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.	Short list	Figures to 2 decimal places.	Eurostat - EU SILC
5	<b>Material and Social Deprivation</b>	<b>Material and Social Deprivation rate</b>	EU	Share of population living in households lacking at least 5 items out of the 13 deprivation items (see 1c above):	Long list	Only people lacking an item for affordability reasons (i.e. “enforced lack” - not lack by choice or due to any other reasons) are considered deprived of this item.  (See also 1c above)	Eurostat - EU SILC

code	Key dimension	Commonly agreed indicator	Type (EU indicator/ NAT - national indicator)	Definition	Breakdowns	Comments	data source
6	Health inequalities	Healthy life expectancy	NAT	<p>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).</p> <p>To be interpreted jointly with life expectancy</p>	Short list		Eurostat - there are two components to the calculations - mortality statistics (Eurostat's demographic database) and data on self-perceived disability (Eurostat - EU-SILC)
7	Educational outcome and human capital formation	Early school leavers	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
8	Financial sustainability of social protection systems	Projected total public social expenditures	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
9	Pension adequacy	Median relative income of elderly people	EU	Median equivalised income of people aged 65+ as a ratio of income of people aged 0-64	Gender		Eurostat - EU SILC



code	Key dimension	Commonly agreed indicator	Type (EU indicator/ NAT - national indicator)	Definition	Breakdowns	Comments	data source
10	Pension adequacy	Aggregate replacement ratio	EU	Median individual pension income of the 65-74 age group relative to median individual earnings of the 55-64 age group, excluding other social benefits <sup>20</sup>	Gender		Eurostat - EU SILC
11	Inequalities in access to health care	Self-reported unmet need for medical care  Care utilisation	NAT	Total self-reported unmet need for medical care for the following three reasons: financial barriers + waiting times + too far to travel  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)	Short list		Eurostat - EU SILC
12	Household income (aggregate for the household sector, providing a link between macro-economic developments and household income developments)	Growth rate in real gross household disposable income (GHDH (unadjusted))	EU	GHDH= 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)  Real GDHI is calculated as nominal GDHI divided by the deflator of household final consumption expenditure.	Evolution (growth rate) of the overall GHDH 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.  "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>20</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 include: 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/ NAT - national indicator)	Definition	Breakdowns	Comments	data source
13	Improved standards of living resulting from economic growth	At-risk-of-poverty rate anchored at a fixed moment in time <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 the base survey year, up-rated by inflation over the years	Long list		Eurostat - EU SILC
14	Employment of older workers	Employment rate of older workers	EU	Persons in employment in age groups 55 - 59 and 60 – 64 as a proportion of total population in the same age group	Gender		Eurostat - LFS
15	In-work poverty	In-work at-risk-of-poverty rate	EU	Individuals who are classified as employed <sup>21</sup> (distinguishing between “wage and salary employment plus self-employment” and “wage and salary employment” only) and who are at risk of poverty.  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.	Long list		Eurostat - EU SILC
16	Participation in the labour market	Activity rate	EU	Share of employed and unemployed people in the total population of working age 15-64	By gender and age: 15-24, 25-54, 55-59; 60-64; 55-64; Total		Eurostat - LFS

<sup>21</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/ NAT - national indicator)	Definition	Breakdowns	Comments	data source
17	Regional cohesion	Regional disparities – coefficient of variation of employment rates	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
18	Effectiveness of social protection system	At-risk-of-poverty rate of population living in (quasi-) jobless households	EU	Share of persons aged (0-64) with an equivalised disposable income below 60% of the national equivalised median income who live in households where working-age adults (18-64) worked 20% or less of their total work potential during the past year.	Short list		Eurostat - EU SILC

## 4.2 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.

- (1) *GDP growth*
- (2) *Employment rate*, by gender  
*Unemployment rate*, by gender, and key age groups (15-24, 25-54, 55-59, 60-64, 55-64.)  
*Long term unemployment rate*, by gender and key age groups (15-24, 25-54, 55-59, 60-64, 55-64.)
- (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>22</sup>.
- (11) *At-risk of poverty rate before social cash transfers* (other than pensions, i.e. with pensions included in the original income), 0-17, 18-64, 65+<sup>23</sup>
- (12) *Change in projected theoretical replacement ratio (NAT)*<sup>24</sup> for base case accompanied with information on type of pension scheme (DB, DC or NDC), and *change in projected public pension expenditure*. (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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<sup>22</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 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>23</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 cash 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>24</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 (for the reference period reported in the latest Pensions Adequacy Report), with information on the type of pension scheme (DB, DC or NDC) and changes in the public pension expenditure as a share of GDP (for the reference period reported in the latest Pensions Adequacy Report). 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)

## 5. 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.

## 5.1 Social inclusion - Primary indicators

code	Commonly agreed indicator	Type (EU indicator/ NAT - national indicator)	Definition	Breakdowns	Comments	data source
<b>PRIMARY INDICATORS</b>						
<b>SI-P1</b>	<b>At-risk-of poverty rate + illustrative threshold values</b>	EU	Share of persons aged 0+ with an equivalised disposable income below 60% of the national equivalised median income <sup>25</sup> .  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.	Long list	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
<b>SI-P2</b>	<b>Persistent at-risk of poverty rate</b>	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.	Short list		Eurostat - EU SILC
<b>SI-P3</b>	<b>Relative median poverty risk gap</b>	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.	Short list		Eurostat - EU SILC
<b>SI-P4</b>	<b>Impact of social cash transfers (excluding pensions) on the reduction in the at-risk-of-poverty rate</b>	EU	Reduction in the at-risk-of-poverty rate in percentage (%) due to social cash transfers, calculated as the percentage difference between the at-risk-of-poverty rate before and after social transfers. Pensions are included in the original income (not in social transfers)	Long list		Eurostat - EU SILC

<sup>25</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/ NAT - national indicator)	Definition	Breakdowns	Comments	data source
<b>PRIMARY INDICATORS</b>						
SI-P5	In-work at-risk-of-poverty rate	EU	Individuals who are classified as employed according to their most frequent activity status and are at risk of poverty.	Long list  Distinction is made between “wage and salary employment plus self-employment” and “wage and salary employment” only		Eurostat - EU SILC
SI-P6	Population living in (quasi-)jobless households	EU	Share of people aged 0-64 living in (quasi-)jobless households (i.e. households with very low work intensity), where on average working-age adults (aged 18-64) work 20% or less of their total work potential during the past year.	Long list	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-P7	At-risk-of-poverty rate of population living in (quasi-)jobless households	EU	Share of persons aged (0-64) with an equivalised disposable income below 60% of the national equivalised median income who live in households where working-age adults (18-64) worked 20% or less of their total work potential during the past year.	Long list		Eurostat - EU SILC
SI-P8	Material and Social Deprivation rate		Share of population living in households lacking at least 5 items out of the following 13 items:  <i>Households items:</i>  1. Ability to face unexpected expenses; 2. Afford one week annual holiday away from home; 3. Avoid arrears (in mortgage rent, utility bills and/or hire purchase instalments); 4. Afford a meal with meat, chicken, fish or vegetarian equivalent every second day; 5. Afford keeping their home adequately warm; 6. Have access to	Long list	The indicator of <i>material and social deprivation</i> replaces the standard <i>material deprivation</i> indicator which the EU adopted in 2009.  Only people lacking an item for affordability reasons (i.e. “enforced lack” - not lack by choice or due to any other reasons) are considered	Eurostat - EU SILC

code	Commonly agreed indicator	Type (EU indicator/ NAT - national indicator)	Definition	Breakdowns	Comments	data source
	<b>PRIMARY INDICATORS</b>					
			<p>a car/van for personal use; 7. Afford replacing worn-out furniture</p> <p><i>Personal items:</i></p> <p>8. Have access to an internet connection 9. Afford replacing worn-out clothes by some new ones 10. Afford having two pairs of properly fitting shoes (including a pair of all-weather shoes) 11. Afford spending a small amount of money each week on him/herself 12. Afford having regular leisure activities 13. Afford getting together with friends/family for a drink/meal at least once a month</p>		<p>deprived of this item.</p> <p>Seven out of the 13 deprivation items included in the new indicator are collected at the household level and are thus assumed to apply equally to all household members. The remaining six items are collected at the individual level: they are collected only for people aged 16 or over and have therefore to be “distributed” to children below 16. The rule applied for this distribution is the following: “if at least half the number of adults for which the information is available in the household lack an item, then the children living in that household are considered as deprived from that item.</p>	
<b>SI-P9</b>	<b>Child-specific deprivation rate</b>		<p>The child-specific deprivation <u>rate</u> is the percentage of children aged between 1 and 15 years who suffer from the enforced lack of at least three items out of the following 17 (unweighted) items:</p> <ol style="list-style-type: none"> <li>Child: Some new clothes</li> <li>Child: Two pairs of shoes</li> <li>Child: Fresh fruits and vegetables daily</li> <li>Child: Meat, chicken, fish daily</li> <li>Child: Suitable books</li> <li>Child: Outdoor leisure equipment</li> <li>Child: Indoor games</li> <li>Child: Leisure activities</li> </ol>	Long list + education of parents	<p>Indicator on “child well-being”</p> <p>Only children lacking an item for affordability reasons (and not by choice or due to any other reasons) are considered deprived of this item.</p> <p>It should be analysed in combination with a complementary indicator on the depth of child deprivation</p> <p>See also indicators under the section</p>	Thematic EU-SILC module on children. Module collected in 2014 and starting in 2021 every third year (2021, 2024...)

code	Commonly agreed indicator	Type (EU indicator/ NAT - national indicator)	Definition	Breakdowns	Comments	data source
<b>PRIMARY INDICATORS</b>						
			9. Child: Celebrations 10. Child: Invite friends 11. Child: School trips 12. Child: Holiday 13. Household: Replace worn-out furniture 14. Household: Arrears 15. Adults in the household: Internet <sup>26</sup> 16. Household: Home adequately warm 17. Household: Car		"Investing in children"	
<b>SI-P10</b>	<b>Long term unemployment rate</b>	EU	Total long-term unemployed population (≥12 months' unemployment; ILO definition) as a proportion of total active population aged 15 years or more.	Gender, age (15-24, 25-54, 55-59, 60-64, 55-64, Total)	The long term unemployment rate needs to be interpreted in the light of information on the activity/inactivity rate of the population.	Eurostat-LFS
<b>SI-P11</b>	<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. <u>The indicator needs to be supplemented by relevant national data covering other key aspects of inclusion of immigrants.</u>	Eurostat-LFS
<b>SI-P12</b>	<b>Early school leavers</b>	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

<sup>26</sup> If at least half of the adults in the household are deprived of this item, child is considered deprived of the item.



code	Commonly agreed indicator	Type (EU indicator/ NAT - national indicator)	Definition	Breakdowns	Comments	data source
<b>PRIMARY INDICATORS</b>						
<b>SI-P13</b>	<b>Self-reported unmet need for medical care (examination)</b>  <b>Care utilisation</b>	NAT	Total self-reported unmet need for medical examination for the following three reasons: financial barriers + waiting times + too far to travel  To be analysed together with care utilisation defined as the number of visits to a doctor (GP or specialist) during the last 12 months.	Long list	<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 (from relevant EU-SILC module).  Additional source of data on the number of physician consultations is OECD health data and EHIS	Eurostat - EU SILC
<b>SI-P14</b>	<b>Housing</b>				Further work is necessary before the including of an indicator on housing in the primary list.	

## 5.2 Social inclusion - Secondary indicators

Code	Commonly agreed indicator	Type (EU indicator/ NAT - national indicator)	Definition	Breakdowns	Comments	data source
<b>SECONDARY INDICATORS</b>						
SI-S1	Dispersion around the at-risk-of-poverty threshold	EU	Share of persons aged 0+ with an equivalised disposable income below 40%, 50% and 70% of the national equivalised median income.	Short list		Eurostat - EU SILC
SI-S2	At-risk-of-poverty rate of children living in households at work		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-S3	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:  Age groups: 25-34; 35-54; 25-54, 55-64; 65+; 25-64.		Eurostat
SI-S4	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-S5	Depth of material and social deprivation	EUJ	The average number of deprivation items lacked, because of an enforced lacked, by the materially and socially deprived population.	Long list  For children by age and educational attainment level of their parents	Complements the Material and Social Deprivation indicator  This indicator concerns the whole materially and socially deprived population and not only the severely materially and socially deprivation	Eurostat - EU SILC

Code	Commonly agreed indicator	Type (EU indicator/ NAT - national indicator)	Definition	Breakdowns	Comments	data source
<b>SECONDARY INDICATORS</b>						
					population. It, however, does not concern the people who are not considered materially and socially deprived, i.e. those lacking less than 5 items	
<b>SI-S6</b>	<b>Housing cost overburden rate</b>	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 cash 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 cash transfer by public authority to owner occupiers to alleviate their current housing costs; in practice, often help with mortgage reimbursements).</p>	Long list		Eurostat - EU SILC

Code	Commonly agreed indicator	Type (EU indicator/ NAT - national indicator)	Definition	Breakdowns	Comments	data source
<b>SECONDARY INDICATORS</b>						
<b>SI-S7</b>	<b>Overcrowding rate</b>		<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>	Long list		Eurostat - EU SILC
<b>SI-S8</b>	<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>	Long list	This indicator needs to be further improved.	Eurostat - EU SILC

Code	Commonly agreed indicator	Type (EU indicator/ NAT - national indicator)	Definition	Breakdowns	Comments	data source
<b>SECONDARY INDICATORS</b>						
<b>SI-S10</b>	<b>Impact of social cash transfers (excluding pensions) on the reduction in the at-risk-of-poverty rate</b>		Reduction in the at-risk-of-poverty rate in % due to social cash transfers, calculated as the percentage difference between the at-risk-of-poverty rate before and after social cash transfers. Pensions are included in the original income (not in social transfers)	Long list	.	Eurostat - EU SILC
<b>SI-S11</b>	<b>Population living in jobless households</b>	EU	Proportion of people living in jobless households, expressed as a share of all people in the same age group <sup>27</sup> .	Gender age: 15-24, 25-54, 55-59, 60-64, 55-64	LFS-based indicator.  This indicator should be analysed in the light of the context information on jobless households by main household types	Eurostat - LFS
<b>SI-S12</b>	<b>Benefit recipient rate</b>	EU	Share of working age individuals (aged 18-64) receiving any benefits (other than old age benefits) among people (a) at-risk-of poverty (b) living in (quasi-)jobless households (i.e. households with very low work intensity) and (c) population at-risk-of poverty and living in (quasi-)jobless households	(a) at-risk-of poverty (b) living in (quasi-)jobless households and (c) population at-risk-of poverty and living in (quasi-)jobless households	The indicator is an important element of the effectiveness of social protection systems as it captures the capacity of the system to reach individuals in need of support.  Age range changed from 18-59 to 18-64 in 2022	Eurostat - EU SILC

<sup>27</sup> Students aged 18-24 years who live in households composed solely of students are not counted in neither numerator nor denominator.

Code	Commonly agreed indicator	Type (EU indicator/ NAT - national indicator)	Definition	Breakdowns	Comments	data source
<b>SECONDARY INDICATORS</b>						
<b>SI-S13</b>	<b>At-risk of poverty or social exclusion rate for people with disabilities (16+)</b>	NAT	The sum of persons with disabilities who are: at-risk-of-poverty or severely materially and socially deprived or living in (quasi-)jobless households (i.e. households with very low work intensity) as a share of the total population of persons with disabilities	Persons with different levels of disabilities (moderate, severe)	Here the reference population is persons aged 16+ with moderate or severe disabilities, based on the Global Activity Limitation Indicator (GALI) approach (i.e. persons who report either moderate or severe health-related activity limitations),	Eurostat - EU SILC
<b>SI-S14</b>	<b>Depth of child deprivation</b>		The mean number of deprivation items among deprived children	Long list	The indicator offers a complementary view on the child deprivation indicator, by showing the intensity of child deprivation, and will allow to show progress also in the countries with high deprivation rates.	Thematic EU-SILC module on children.  Module collected in 2014 and starting in 2021 every third year (2021, 2024...)

### 5.3 Social inclusion – Context information

Code	Commonly agreed information item	Type (EU / NAT - national )	Definition	Breakdowns	Comments	data source
<b>CONTEXT INFORMATION</b>						
SI-C1	Income quintile ratio (S80/S20)	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.	Short list	Figures to 2 decimal places.	Eurostat - EU SILC
SI-C2	Gini coefficient	EU	The Gini coefficient measures the extent to which the distribution of income deviates from a perfectly equal distribution. 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).	Short list		Eurostat - EU SILC
SI-C3	Regional disparities – coefficient of variation of employment rates	NAT	The dispersion of employment rates (measured using the coefficient of variation) across NUTS level 2.			Eurostat-LFS
SI-C4	Life expectancy	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); age (at birth, at 65)		Eurostat-Demographic database



code	Commonly agreed information item	Type (EU / NAT - national )	Definition	Breakdowns	Comments	data source
<b>CONTEXT INFORMATION</b>						
SI-C5	Healthy life expectancy (e.g. at birth)	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); age (at birth, at 65); by 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-C6	At-risk-of-poverty rate anchored at a fixed moment in time	EU	Share of persons aged 0+ with an equivalised disposable income below the at-risk-of-poverty threshold calculated in survey year up-rated by inflation over the years	Long list		Eurostat - EU SILC
SI-C7	At-risk-of-poverty rate before social cash transfers (other than pensions)	EU	The share of persons with an equivalised disposable income, before social cash transfers, below the risk-of-poverty threshold, which is set at 60 % of the national median equivalised disposable income (after social cash transfers). Retirement and survivor's pensions are counted as original income and not as social cash transfers.	Long list	.	Eurostat - EU SILC
SI-C8	Impact of social cash transfers (including pensions) on the reduction in the at-risk-of-poverty rate		Reduction in the at-risk-of-poverty rate in % due to social cash transfers, calculated as the percentage difference between the at-risk-of-poverty rate before and after social cash transfers. Pensions are included in the original income (not in social transfers)	Long list	.	Eurostat - EU SILC
SI-C9	Jobless households by main household type	EU	Proportion of people living in jobless households, expressed as a share of all people in the same age group	by household type		Eurostat - LFS

code	Commonly agreed information item	Type (EU / NAT - national )	Definition	Breakdowns	Comments	data source
<b>CONTEXT INFORMATION</b>						
<b>SI-C10</b>	<b>In-work at-risk-of-poverty rate</b>	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
<b>SI-C11</b>	<b>Making work pay indicators: Unemployment trap</b>	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
<b>SI-C12</b>	<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 / NAT - national )	Definition	Breakdowns	Comments	data source
<b>CONTEXT INFORMATION</b>						
<b>SI-C13</b>	<b>Making work pay indicators:</b> low-wage trap	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
<b>SI-C14</b>	<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	by 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 / NAT - national )	Definition	Breakdowns	Comments	data source
<b>CONTEXT INFORMATION</b>						
<b>SI-C15</b>	<b>Self-reported limitations in daily activities</b>	n.a.	Self-reported limitations in daily activities defined as the percentage sum of people reporting to be limited or very limited.	Short list		Eurostat - EU SILC
<b>SI-C16</b>	<b>Share of housing costs in total disposable household income</b>	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) - median for the total population - median for population at-risk-of poverty	Short list		Eurostat - EU SILC
<b>SI-C17</b>	<b>Relative poverty risk gap of income from benefits</b>	EU	Difference between the median equivalised income from benefits and the at-risk-of poverty threshold, expressed as a percentage of the threshold (among (a) people at-risk-of poverty, (b) living in (quasi-)jobless households (i.e. households with very low work intensity) and (c) the combined at-risk-of poverty and living in (quasi-)jobless households, receiving working-age benefits).	(a) at-risk-of poverty (b) living in (quasi-)jobless households and (c) population at-risk-of poverty and living in (quasi-) jobless households	For individuals aged 18-64 (changed from 18-59 in 2022)	Eurostat - EU SILC
<b>SI-C18</b>	<b>Relative poverty risk gap of total disposable household income</b>	EU	Difference between the median equivalised total disposable income and the at-risk-of poverty threshold, expressed as a percentage of the at-risk-of poverty threshold (among (a) people at-risk-of poverty, (b) living in (quasi-)jobless households (i.e. households with very low work intensity) and (c) the combined at-risk-of poverty and living in (quasi-)jobless households, receiving working-age benefits).	(a) at-risk-of poverty (b) living in (quasi-)jobless households and (c) population at-risk-of poverty and living in (quasi-) jobless households	For individuals aged 18-64 (changed from 18-59 in 2022)	Eurostat - EU SILC

Code	Commonly agreed information item	Type (EU / NAT - national )	Definition	Breakdowns	Comments	data source
<b>CONTEXT INFORMATION</b>						
SI-C19	Share of people whose total disposable household income received from benefits is more than 50%	EU	Share of people whose total disposable household income received from benefits is more than 50% (among (a) people at-risk-of poverty, (b) living in (quasi-)jobless households (i.e. households with very low work intensity) and (c) the combined at-risk-of poverty and living in (quasi-)jobless households, receiving working-age benefits).	(a) at-risk-of poverty (b) living in (quasi-)jobless households and (c) population at-risk-of poverty and living in (quasi-) jobless households	For individuals aged 18-64 (changed from 18-59 in 2022)	Eurostat - EU SILC
SI-C20	Share of people whose total disposable household income received from benefits is more than 90%	EU	Share of people whose total disposable household income received from benefits is more than 90% (among (a) people at-risk-of poverty, (b) living in (quasi-)jobless households (i.e. households with very low work intensity) and (c) the combined at-risk-of poverty and living in (quasi-)jobless, receiving working-age benefits).	(a) at-risk-of poverty (b) living in (quasi-)jobless households and (c) population at-risk-of poverty and living in (quasi-) jobless households	For individuals aged 18-64 (changed from 18-59 in 2022)	Eurostat - EU SILC
SI-C21	At-risk-of poverty rate for persons with disabilities (16+)	NAT	The <b>at-risk-of poverty rate</b> refers to the percentage of persons in the total population who are at-risk-of-poverty, i.e. with an equivalised disposable income below the at-risk-of-poverty threshold.	Gender, age and level of disability (moderate and severe)	Here the reference population is persons aged 16+ with moderate or severe disabilities, based on the Global Activity Limitation Indicator (GALI) approach (i.e. persons who report either moderate or severe health-related activity limitations),	Eurostat - EU SILC

Code	Commonly agreed information item	Type (EU / NAT - national )	Definition	Breakdowns	Comments	data source
<b>CONTEXT INFORMATION</b>						
SI-C22	Material or social deprivation rate for persons with disabilities (16+)	NAT	The share of persons with disabilities who experience an enforced lack of 5 or more of the 13 deprivation items in the list of material and social deprivation items. These deprivations are the inability to: face unexpected expenses; afford one week annual holiday away from home; avoid arrears (in mortgage, rent, utility bills and/or hire purchase instalments); afford a meal with meat, chicken or fish or vegetarian equivalent every second day; afford keeping their home adequately warm; have access to a car/van for personal use; replace worn-out furniture: replace worn-out clothes with some new ones; have two pairs of properly fitting shoes; spend a small amount of money each week on him/herself ("pocket money"); have regular leisure activities; get together with friends/family for a drink/meal at least once a month; and have an internet connection.	Gender, age and level of disability (moderate and severe)	Here the reference population is persons aged 16+ with moderate or severe disabilities, based on the Global Activity Limitation Indicator (GALI) approach (i.e. persons who report either moderate or severe health-related activity limitations),	Eurostat - EU SILC
SI-C23	Severe material and social deprivation rate for persons with disabilities (16+)	NAT	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) keep home adequately warm, iii) face unexpected expenses, iv) eat meat, fish or a protein equivalent every second day, v) a week holiday away from home, or could not afford (even if wanted to) vi) a car, vii) a washing machine, viii) a colour TV, or ix) a telephone.	Gender, age and level of disability (moderate and severe)	Here the reference population is persons aged 16+ with moderate or severe disabilities, based on the Global Activity Limitation Indicator (GALI) approach (i.e. persons who report either moderate or severe health-related activity limitations),	Eurostat - EU SILC

Code	Commonly agreed information item	Type (EU / NAT - national )	Definition	Breakdowns	Comments	data source
<b>CONTEXT INFORMATION</b>						
SI-C24	Share of persons with disabilities living in (quasi-)jobless households (aged 16-64))	NAT	The indicator persons living in (quasi-)jobless households (i.e. households with very low work intensity) is defined as the number of persons living in a household where the members of working age worked 20 % or less of their total potential during the previous 12 months.	Gender, age and level of disability (moderate and severe).	Here the reference population is persons aged 16-64 with moderate or severe disabilities, based on the Global Activity Limitation Indicator (GALI) approach (i.e. persons who report either moderate or severe health-related activity limitations),	Eurostat - EU SILC
SI-C25	Impact of social cash transfers (excluding pensions) on poverty risk reduction for persons with disabilities (16+)	NAT	Reduction in percentage of the risk of poverty rate, due to social cash transfers, for the population of persons with disabilities. Pensions are included in the original income (not in social cash transfers)	Persons with disabilities (moderate and severe).	Here the reference population is persons aged 16+ with moderate or severe disabilities, based on the Global Activity Limitation Indicator (GALI) approach (i.e. persons who report either moderate or severe health-related activity limitations),	Eurostat - EU SILC
SI-C26	S80/S50 income quintile share ratio	EU	The ratio of (total share of income of the 20% richest in the income distribution of a Member State, based on net disposable household equivalised income): (total share of income of the middle 20% in the income distribution of a Member State, whose income is calculated on the basis of net disposable household equivalised income).	Short list	The indicator is to be calculated to two decimal places.	Eurostat - EU SILC
SI-C27	S50/S20 income quintile share ratio	EU	The ratio of (total share of income of the middle 20% in the income distribution of a Member State, based on net disposable household equivalised income): (total share of income of the poorest 20% in the income distribution of a Member State, whose income is calculated on the basis of net disposable household equivalised income).	Short list	The indicator is to be calculated to two decimal places.	Eurostat - EU SILC
SI-C28	S40 income share	EU	The total share of income of the bottom 40% in the income distribution of a Member State, based on net disposable household equivalised income.	Short list	The indicator is to be calculated to two decimal places.	Eurostat - EU SILC



Code	Commonly agreed information item	Type (EU / NAT - national )	Definition	Breakdowns	Comments	data source
<b>CONTEXT INFORMATION</b>						
<b>SI-C29</b>	<b>Income inequality reducing effect of both taxes and social cash transfers</b>	EU	The extent to which both social cash transfers and personal income taxes reduce market income inequality in the distribution of income in the EU Member States	Short list	It is calculated as the difference between the income inequality measured using the S80/S20 calculated on the basis of a market income distribution, and the same measure, calculated for the same population, but based on a net disposable income definition.	Eurostat - EU SILC
<b>SI-C30</b>	<b>Income inequality reducing effect of taxes</b>	EU	The extent to which personal income taxes on their own contribute to reducing market income inequality in the distribution of income in the EU Member States.	Short list	It is calculated as the difference between the income inequality measured using the S80/S20 calculated on the basis of a market income distribution whereby income is understood to be gross of any tax, and the same measure, calculated for the same population, but based on an income definition net of taxes. In both cases, income from social cash transfers are omitted.	Eurostat - EU SILC
<b>SI-C31</b>	<b>Income inequality reducing effect of social cash transfers</b>	EU	The extent to which social cash transfers on their own contribute to reducing market income inequality in the distribution of income in the EU Member States.	Short list	It is calculated as the difference between the income inequality measured using the S80/S20 calculated on the basis of a market income distribution whereby income is understood to be gross of any tax, and the distribution of income including income received from social transfers but still without deducting any tax, calculated for the same population	Eurostat - EU SILC

## 6. 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.

## 6.1 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."*

code	Commonly agreed indicator	Type (EU indicator/ NAT - national indicator)	Definition	Breakdowns	Comments	data source
<b>PRIMARY INDICATORS</b>						
<b>PN-P1</b>	<b>At-risk-of-poverty rate of older people</b>	EU	Risk of poverty for people aged 65+  Complemented by composition of income	By 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
<b>PN-P2</b>	<b>Median relative income of elderly people</b>	EU	Median equivalised disposable income of people aged 65+ as a ratio of income of people aged 0-64	By gender	This indicator informs on the overall adequacy of income of older people. Related context information: composition of income	Eurostat - EU SILC
<b>PN-P3</b>	<b>Aggregate replacement ratio</b>	EU	Ratio of the median individual pensions of the 65-74 age group relative to median individual earnings of the 55-64 age group, excluding other social benefits	By gender	This indicator informs on the overall adequacy of income of pensioners, in relation to older workers  Currently pension income encompasses only first pillar schemes.  Age range of denominator is 55-64 (changed from 50-59 in 2022)	Eurostat - EU SILC

code	Commonly agreed indicator	Type (EU indicator/ NAT - national indicator)	Definition	Breakdowns	Comments	data source
PRIMARY INDICATORS						
PN-P4	<p><b>Change in projected theoretical replacement ratio for base case (over the reference period in the latest Pensions Adequacy Report) accompanied with information on type of pension scheme (DB, DC or NDC) and change in projected public pension expenditure (over the reference period in the latest Pensions Adequacy Report)</b></p> <p>These results should systematically be presented collectively in one table.</p> <p>+ assumptions and relevant background information on representativeness</p> <p>+ present also calculations of changes in replacement rates for one or two other cases, if suitable (e.g. OECD)</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, (over the reference period in the latest Pensions Adequacy Report), with information on the type of pension scheme (DB, DC or NDC) and changes in the public pension expenditure as a share of GDP, (over the reference period in the latest Pensions Adequacy Report).</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 over the reference period in the latest Pensions Adequacy Report.</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/ NAT - national indicator)	Definition	Breakdowns	Comments	data source
SECONDARY INDICATORS						
PN-S1	At-risk-of poverty rate of older people	EU	Risk of poverty for people aged 0-64, 0-74, 65+, 75+ <sup>28</sup>	By age: 0-64, 0-74, 65+, 75+ By gender	Poverty rate of elderly people (at the 60% threshold of equivalised income).  These breakdowns allow to isolate the specific situation of different age groups (younger / older) than the primary indicator.	Eurostat - EU SILC
PN-S2	Median relative income of elderly people (65+)	EU	Median equivalised disposable income of people aged 65+ as a ratio of equivalised disposable income of people aged 0-64	By gender	This indicator informs on the overall adequacy of income of older people  Related indicator: composition of income	Eurostat - EU SILC
PN-S3	Aggregate replacement ratio (incl. other social benefits)	EU	Ratio of median individual pensions of the 65-74 age group relative to median individual earnings of the 55-64 age group, including other social benefits.	By gender	Currently pension income encompasses only first pillar schemes.	Eurostat - EU SILC
PN-S4	Income inequality among population aged 65+	EU	Income quintile ratio (S80/S20) among population aged 65+	By 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>28</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/ NAT - national indicator)	Definition	Breakdowns	Comments	data source
<b>SECONDARY INDICATORS</b>						
<b>PN-S5</b>	<b>At-risk-of-poverty gap of elderly people</b>	EU	Poverty gap by age brackets (for 65+ and 75+) at the 60% threshold	By age 65+, 75+ <sup>24</sup>	This indicator complements indicators on poverty rates and is complementary to sensitivity analysis	Eurostat - EU SILC
<b>PN-S6</b>	<b>At-risk-of-poverty rate of pensioners</b>	EU	At-risk-of-poverty rate restricted to the field of people whose main activity status is 'retired'	By 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
<b>PN-S7</b>	<b>Incidence of risk of elderly poverty by housing tenure status</b>	EU	Incidence of risk of poverty for people belonging to the 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	By age: 65+, 75+ <sup>24</sup>	This indicator complements indicators on poverty rates for different housing tenure status	Eurostat - EU SILC
<b>PN-S8</b>	<b>Risk of poverty calculated at 50% and 70% of median national equivalised income for the elderly</b>	EU	Risk of poverty calculated at 50% and 70% of median national equivalised income for people aged 65+ and 75+.	By age: 65+, 75+ <sup>24</sup>	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 65+, 75+ (EU type item).

## 6.2 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."*

code	Commonly agreed indicator	Type (EU indicator/ NAT - national indicator)	Definition	Breakdowns	Comments	data source
<b>PRIMARY INDICATORS</b>						
<b>PN-P5</b>	<b>Total current pension expenditure (% of GDP)</b>	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
<b>PN-P6</b>	<b>Employment rate</b>	EU	% of persons employed in relation to the total number of people in a given age group.	By age: 15-24, 25-54, 55-59, 60-64, 55-64, 65-69  and all by gender	Employment rate of 55-64 people is an essential aspect of sustainability.  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/ NAT - national indicator)	Definition	Breakdowns	Comments	data source
<b>PRIMARY INDICATORS</b>						
<b>PN-P7</b>	<b>Effective labour market exit age</b>  <b>NOW REPLACED BY</b> <b>Duration of working life</b>	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>	By 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. An indicator called 'duration of working life' was developed to replace the old 'average exit age'.</p>	Eurostat - LFS
<b>PN-P8</b>	<b>Projections of pension expenditure, public and total, (over the reference period in the latest Pensions Adequacy Report) (% 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/ NAT - national indicator)	Definition	Breakdowns	Comments	data source
<b>SECONDARY INDICATORS</b>						
<b>PN-S9</b>	<b>Total social protection expenditures (% of GDP)</b>	NAT	Total expenditure on social protection (as % of GDP)	None	In development: gross / net expenditure	Eurostat - ESSPROS
<b>PN-S10</b>	<b>Decomposition of the projected increase in public pension expenditure</b>	NAT	<p>Decomposition with the old age dependency ratio, the employment effect, the take-up ratio and the benefit ratio.</p> <p>Specific assumptions agreed in the AWG.</p> <p>For further details, see the 2009 Ageing Report: Underlying Assumptions and Projection Methodologies for the EU-27 Member States (2007-2060).</p>	None	<p>Projections of pension expenditures also reflect assumptions made on economic trends (notably evolution of employment rates, in particular for older workers).</p> <p>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)</p>	EPC AWG

### **Context information**

**PN-C2**      **EU: Old-age dependency ratio (Current and projected for 2030, 2050, etc.) – Eurostat<sup>29</sup>**

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

**PN-C4**      **NAT: Pension system dependency ratio** (Number of pensioners relative to contributors, current and projected up to end of reference period in the latest Pensions Adequacy Report). Specific assumptions by AWG<sup>30</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>19</sup>

<sup>29</sup> The development of dependency ratios provides key information on future pressures on pension systems expenditures and resources.

<sup>30</sup> See "The 2005 EPC projections of age-related expenditure (2004-2050) for the EU-25 Member States: underlying assumptions and projection methodologies".

### 6.3 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".*

code	Commonly agreed indicator	Type (EU indicator/ NAT - national indicator)	Definition	Breakdowns	Comments	data source
<b>PRIMARY INDICATORS</b>						
<b>PN-P9</b>	<b>Gender differences in the risk of poverty</b>	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+ Total + women/men living alone	Related secondary indicators: by age group (60+ and 75+ and below 60, 75);	Eurostat - EU SILC
<b>PN-P10</b>	<b>Gender differences in the relative income of older people</b>	EU	The absolute difference between males and females in the relative income of elderly people (65 and more) for single-person households.  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
<b>PN-P11</b>	<b>Gender differences in aggregate replacement ratio</b>	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 55-64 age category, excluding other social benefits			Eurostat - EU SILC

code	Commonly agreed indicator	Type (EU indicator/ NAT - national indicator)	Definition	Breakdowns	Comments	data source
<b>SECONDARY INDICATORS</b>						
<b>PN-S11</b>	<b>Gender differences in the relative income of older people</b>	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.	By age groups: 65+, 75+, below 65 and below 75);  Total + women/men living alone		Eurostat - EU SILC

## 7. 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 and 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 establishment of 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](#)."

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

code	Commonly agreed indicator	Type (EU indicator/ NAT - national indicator)	Definition	Breakdowns	Comments	data source
PRIMARY INDICATORS						
HC-P1	Self-reported unmet need for medical care (examination)  Care utilisation	NAT  NAT	Total self-reported unmet need for medical examination for the following three reasons: financial barriers + waiting times + too far to travel  To be analysed together with care utilisation defined as the number of visits to a doctor (GP or specialist) during the last 12 months.	Long list	<u>Future developments:</u> 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 (contact with a GP or specialist) is the OECD health data and the EHIS.	Eurostat - EU SILC  Eurostat - EU SILC
HC-P2	Self-reported unmet need for dental care (examination)  Dental care utilisation	NAT	Total self-reported unmet need for dental care for the following three reasons: financial barriers + waiting times + too far to travel  To be analysed together with dental care utilisation defined as the number of visits to the dentist.	Long list	<u>Future developments:</u> resolve discrepancies in EU-SILC translation between countries.  - 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 EHIS.	Eurostat - EU SILC  EHIS, OECD health data, national data

code	Commonly agreed indicator	Type (EU indicator/ NAT - national indicator)	Definition	Breakdowns	Comments	data source
<b>PRIMARY INDICATORS</b>						
<b>HC-P3</b>	<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
<b>HC-P4a</b>	<b>Life expectancy</b>	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  Age: at birth, at 45, at 65		Eurostat
<b>HC - P4b</b>	<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
<b>HC-P5a</b>	<b>Healthy life years</b>	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  Age: at birth, at 45, at 65	To be interpreted jointly with life expectancy	Eurostat

code	Commonly agreed indicator	Type (EU indicator/ NAT - national indicator)	Definition	Breakdowns	Comments	data source
	PRIMARY INDICATORS					
HC-P5b	Healthy life years by socio-economic status	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/ NAT - national indicator)	Definition	Breakdowns	Comments	data source
<b>SECONDARY INDICATORS</b>						
HC-S1	Self-perceived limitations in daily activity	NAT	Self-perceived limitations in daily activities defined as the percentage sum of people reporting to be limited or very limited.	Long list		Eurostat - EU SILC
HC-S2	Self-perceived general health	NAT	Self-perceived general health defined as the percentage sum of people reporting bad or very bad health.	Long list		Eurostat - EU SILC
HC - S3a	Infant mortality	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 1000 live births.	Gender		Eurostat
HC - S3b	Infant mortality by socio-economic status	NAT	Infant mortality as defined above but presented by socio-economic status of parents (such as level of education, income quantile...)	None	To be reported using national data sources when available until EU comparable breakdown data becomes available	National data

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

code	Commonly agreed indicator	Type (EU indicator/ NAT - national indicator)	Definition	Breakdowns	Comments	data source
PRIMARY INDICATORS						
HC-P6	Vaccination coverage in children	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.  and  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	Cervical cancer screening	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  (Member States not covered can use other national sources or other international sources)
HC-P8	Cervical cancer survival rates	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. ECHI data, international and national sources can be used.	ECHI information based on information provided by the international agency on research on

code	Commonly agreed indicator	Type (EU indicator/ NAT - national indicator)	Definition	Breakdowns	Comments	data source
	PRIMARY INDICATORS					
						cancer (IARC)
HC-P9	Colorectal cancer survival rate	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. 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/ NAT - national indicator)	Definition	Breakdowns	Comments	data source
<b>SECONDARY INDICATORS</b>						
HC-S4	Influenza vaccination for adults over 65	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	Breast cancer screening	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	Breast cancer survival rate	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.  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	Perinatal mortality	NAT	The number of foetal deaths (over 1000g) plus neonatal deaths (0-6 days) per 1000 live births	None	To measure safety of care, one dimension of quality of care.	Eurostat

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

code	Commonly agreed indicator	Type (EU indicator/ NAT - national indicator)	Definition	Breakdowns	Comments	data source
PRIMARY INDICATORS						
HC-P10	Total health expenditure per capita	NAT	Total health expenditure per capita in PPP	None	For Luxembourg to be computed as per person insured.  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 system of health accounts (SHA) data
HC-P11	Total health care expenditure as % of GDP	NAT	Total, public and private expenditure on health as % of GDP  (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	Total long-term care expenditure as % of GDP	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
HC-P13	Projections of public expenditure on health care as % of GDP	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

code	Commonly agreed indicator	Type (EU indicator/ NAT - national indicator)	Definition	Breakdowns	Comments	data source
PRIMARY INDICATORS						
HC-P14	Projections of public expenditure on long-term care as % of GDP	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	Hospital inpatient discharges	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	Hospital day-cases	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
HC-P17	Obesity	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  Age groups: 18-44; 45-54; 55-64; 65+; 75+; 18-64  Income quintile	To measure life-styles or healthy behaviour	EHIS

code	Commonly agreed indicator	Type (EU indicator/ 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	Hospital average length of stay	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	Regular smokers	EU (NAT in 2008)	The percentage of daily cigarette smokers in the population aged 15+	Gender  Age groups: 18-44; 45-54; 55-64; 65+; 75+; 18-64  Income quintile	To measure life-styles or healthy behaviour.	EHIS

code	Commonly agreed indicator	Type (EU indicator/ 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  Age groups: 18-44; 45-54; 55-64; 65+; 75+; 18-64  Income quintile	To measure life-styles or healthy behaviour.	EHIS



## 7.4 Context information

code	Commonly agreed information item	Type (EU / NAT - national)	Definition	Breakdowns	Comments	data source
CONTEXT INFORMATION						
HC-C1	<b>Physicians</b>	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.  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	<b>Nurses and midwives</b>	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.  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	<b>Public and private expenditure as % of total health expenditure</b>	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 / NAT - national)	Definition	Breakdowns	Comments	data source
	CONTEXT INFORMATION					
			<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	<b>Total expenditure on main types of activities or functions of care</b>	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>e) pharmaceuticals and other medical non-durables</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

code	Commonly agreed information item	Type ( <u>EU</u> / <u>NAT</u> - national)	Definition	Breakdowns	Comments	data source
	CONTEXT INFORMATION					
			(HC.5.1)  as % of total current health expenditure and as % of GDP			

## 8. 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.

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

code	Commonly agreed indicator	Type (EU indicator/ NAT - national indicator)	Definition	Breakdowns	Comments	data source
PRIMARY INDICATORS						
IC-P1	At-risk-of-poverty or social exclusion for children (0-17)		The share of children (aged 0-17) who live in a household which is at risk of poverty and/or severely materially or socially deprived and/or a (quasi-)jobless household (i.e. with very low work intensity)  (for the definition of these 3 indicators, see below)	Long list, with by age (0-17, 0-5, 6-11, 12-17)	Breakdown of the Europe 2020 poverty and social exclusion headline target.  Comparison with the working-age population (18-64) and the elderly population (65+) is recommended	Eurostat - EU SILC
IC-P2	At-risk-of-poverty rate for children (0-17)		Share of children (aged 0-17) living in a household with an equivalised disposable income below 60 % of the national median equivalised disposable income.  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)	Long list with by 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-P3a	Material and social deprivation of children (0-17)		Share of child population living in households lacking at least 5 items out of the following 13 items:  <i>Households items:</i>  1. Ability to face unexpected expenses; 2. Afford one week annual holiday away from home; 3. Avoid arrears (in mortgage rent, utility bills and/or hire purchase instalments); 4. Afford a meal with meat, chicken, fish or vegetarian equivalent every second day; 5. Afford keeping their home adequately warm; 6. Have access to a car/van for personal use; 7. Afford replacing worn-out furniture  <i>Personal items (people aged 16+ in the household):</i>	Long list with by age (0-17, 0-5, 6-11, 12-17)	Comparison with the working-age population (18-64) and the elderly population (65+) is recommended  Only people lacking an item for affordability reasons (i.e. "enforced lack" - not lack by choice or due to any other reasons) are considered deprived of this item.  Seven out of the 13 deprivation items included in the new indicator are collected at the household level and	Eurostat - EU SILC

code	Commonly agreed indicator	Type (EU indicator/ NAT - national indicator)	Definition	Breakdowns	Comments	data source
	PRIMARY INDICATORS					
			8. Have access to an internet connection 9. Afford replacing worn-out clothes by some new ones 10. Afford having two pairs of properly fitting shoes (including a pair of all-weather shoes) 11. Afford spending a small amount of money each week on him/herself 12. Afford having regular leisure activities 13. Afford getting together with friends/family for a drink/meal at least once a month		are thus assumed to apply equally to all household members. The remaining six items are collected at the individual level: they are collected only for people aged 16 or over and have therefore to be “distributed” to children below 16. The rule applied for this distribution is the following: “if at least half the number of adults for which the information is available in the household lack an item, then the children living in that household are considered as deprived from that item.	
IC-P3b	Severe material and social deprivation of children (0-17)	EU	<p>Share of child population living in households lacking at least 7 items out of the following 13 items:</p> <p><i>Households items:</i></p> <p>1. Ability to face unexpected expenses; 2. Afford one week annual holiday away from home; 3. Avoid arrears (in mortgage rent, utility bills and/or hire purchase instalments); 4. Afford a meal with meat, chicken, fish or vegetarian equivalent every second day; 5. Afford keeping their home adequately warm; 6. Have access to a car/van for personal use; 7. Afford replacing worn-out furniture</p> <p><i>Personal items (people aged 16+ in the household):</i></p> <p>8. Have access to an internet connection 9. Afford replacing worn-out clothes by some new ones 10. Afford having two pairs of properly fitting shoes (including a pair of all-weather shoes) 11. Afford spending a small amount of money each week on him/herself 12. Afford having regular leisure activities 13. Afford getting together with</p>	Long list with by age (0-17, 0-5, 6-11, 12-17)	<p>Comparison with the working-age population (18-64) and the elderly population (65+) is recommended</p> <p>Only people lacking an item for affordability reasons (i.e. “enforced lack” - not lack by choice or due to any other reasons) are considered deprived of this item.</p> <p>See above indicator for treatment of items that are collected at the individual level (collected only for people aged 16 or over) and how they are “distributed” to children below 16.</p>	Eurostat - EU SILC

code	Commonly agreed indicator	Type (EU indicator/ NAT - national indicator)	Definition	Breakdowns	Comments	data source
	PRIMARY INDICATORS					
			friends/family for a drink/meal at least once a month			
IC-P4	Share of children ( 0-17) living in (quasi-)jobless households		Share of children (aged 0-17) living in a household where working-age adults (aged 18-64) have worked 20 % or less of their total work potential during the past year (i.e. during the income reference period)	Short list with by 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/ NAT - national indicator)	Definition	Breakdowns	Comments	data source
	<b>SECONDARY INDICATORS</b>					
<b>IC-S1</b>	<b>Dispersion of child poverty around the poverty risk threshold: at-risk-of poverty rate calculated with 50% and 70% thresholds</b>		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	Short list with by 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
<b>IC-S2</b>	<b>Persistent at-risk-of-poverty rate for children (0-17)</b>		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	Short list with by 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 information item	Type (EU / NAT – national)	Definition	Breakdowns	Comments	data source
	<b>CONTEXT INFORMATION</b>					
<b>IC-C1</b>	<b>At-risk-of-poverty rate anchored at a fixed moment in time for children</b>		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)	Long list with by 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



## 8.2 Access to adequate resources

code	Commonly agreed indicator	Type (EU indicator/ NAT - national indicator)	Definition	Breakdowns	Comments	data source
<b>PRIMARY INDICATORS</b>						
IC-P5	In-work poverty rate of people living in households with dependent children		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)	Short list with by age (0-17, 0-5, 6-11, 12-17)		Eurostat - EU SILC
IC-P6	At-risk-of-poverty rate for children (0-17) by work intensity of the household		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	By 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	At-risk-of-poverty rate for children (0-17) living in households at work		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].	By household type By work intensity : >0.2, >0.2-0.55], >0.55-1]		Eurostat - EU SILC
IC-P8	Relative median poverty gap for children (0-17)		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		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/ NAT - national indicator)	Definition	Breakdowns	Comments	data source
	<b>PRIMARY INDICATORS</b>					
<b>IC-P9</b>	<b>Indicator of inequality of opportunity – income dimension</b>		The gap in at-risk-of-poverty rates between the children (for the age cohort: less than 18 years old) of low-educated versus those of high-educated parents. It has two versions: an unweighted gap and a weighted gap.		<p>The unweighted gap version is obtained as the difference between the AROP rate of children with low-educated parents and the AROP rate of children with high-educated parents.</p> <p>The weighted version of this gap indicator takes account of differences, across countries, in the composition of the total children population as regards parents' educational attainment level<sup>31</sup>. This weighted indicator corresponds to the unweighted indicator multiplied by the share of children with low-educated parents in the total children population</p> <p>The indicator is to be complemented by the Gini index for the children population.</p>	Eurostat - EU SILC

<sup>31</sup> Children have either low-educated (ISCED11 levels 0-2), middle-educated (ISCED11 levels 3-4) or high-educated parents (ISCED11 levels 5-8).

code	Commonly agreed indicator	Type (EU indicator/ NAT - national indicator)	Definition	Breakdowns	Comments	data source
	<b>SECONDARY INDICATORS</b>					
<b>IC-S3</b>	<b>Childcare</b>		Children cared for (by formal arrangements <sup>32</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
<b>IC-S4</b>	<b>Impact of social transfers (excluding pensions) in reducing child poverty risk</b>		Difference between the children at-risk-of poverty rate before and after social transfers (excluding pensions). Pensions are included in the original income (not in the social transfers)	Long list by 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
<b>IC-S5</b>	<b>Housing cost overburden rate for children (0-17)</b>		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)	Long list by 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

<sup>32</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 / NAT - 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 <ul style="list-style-type: none"> <li>— employment rate of people aged 20-49 living in households in which there are no children aged 0-6 and</li> <li>— employment rate of people aged 20-49 living in households in which there is at least one child aged 0-6</li> </ul>	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
<b>IC-C4</b>	<b>GINI coefficient for children</b>	EU	The Gini coefficient measures the extent to which the distribution of income deviates from a perfectly equal distribution. 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).  Here it is calculated for the child population	Short list by age (0-17, 0-5, 6-11, 12-17)		Eurostat - EU SILC

### 8.3 Access to quality services

code	Commonly agreed indicator	Type (EU indicator/ NAT - national indicator)	Definition	Breakdowns	Comments	data source
<b>PRIMARY INDICATORS</b>						
IC-P10	Early school education		Share of children between age 4 and the start of compulsory education who participate in early childhood education	By gender		UOE <sup>33</sup>
IC-P11	Proficiency in reading, maths and science		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>34</sup>
IC-P12	Young people not in employment, education or training (NEET) rate (15-19)		Young people not in employment, education or training (NEET) rate	By gender, 15-19		Eurostat - LFS
IC-P13	Self-reported unmet need for medical care (16-24)		Proportion of people aged 16-24 reporting not having accessed medical services due to cost, distance or waiting lists	Long list by age (0-17, 0-5, 6-11, 12-17)		Eurostat - EU SILC
IC-P14	Infant mortality		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

<sup>33</sup> UNESCO/OECD/EUROSTAT database on education statistics.

<sup>34</sup> [http://www.oecd.org/statisticsdata/03381,en\\_2649\\_35845621\\_1\\_119656\\_1\\_1\\_1.00.html](http://www.oecd.org/statisticsdata/03381,en_2649_35845621_1_119656_1_1_1.00.html)

code	Commonly agreed indicator	Type (EU indicator/ NAT - national indicator)	Definition	Breakdowns	Comments	data source
PRIMARY INDICATORS						
IC-P15	Child mortality 1-14 years		Death rate per 100 000 population			Eurostat
IC-P16	Low birth weight		Weight at birth of less than 2 500 grams (5.5 pounds)			WHO-OECD
IC-P17	Housing deprivation for children (0-17)		<p>Percentage of the population deprived of each housing deprivation item. The items considered are:</p> <p><a href="#">(1) leaking roof, damp walls/floors/foundation, or rot in window frames or floor;</a></p> <p><a href="#">(2) lack of bath or shower in the dwelling;</a></p> <p><a href="#">(3) lack of indoor flushing toilet for sole use of the household;</a></p> <p><a href="#">(4) problems with the dwelling: too dark, not enough light</a></p>	Long list by age (0-17, 0-5, 6-11, 12-17)		Eurostat - EU SILC
IC-P18	Overcrowding rate for children (0-17)		<p>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:</p> <ul style="list-style-type: none"> <li>— one room for the household;</li> <li>— one room for each couple;</li> <li>— one room for each single person aged 18+;</li> <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</li> </ul>	Long list by age (0-17, 0-5, 6-11, 12-17)		Eurostat - EU SILC

code	Commonly agreed indicator	Type (EU indicator/ NAT - national indicator)	Definition	Breakdowns	Comments	data source
	<b>PRIMARY INDICATORS</b>					
			between 12 and 17 years of age; — one room for two people under 12 years of age.			
<b>IC-P19</b>	<b>Indicator of inequality of opportunity – education dimension</b>		The gap (in percentage points) in the percentage of PISA <sup>35</sup> low achievers for 15-year-olds by socio-economic status (bottom versus top socio-economic quartile).		The gap indicator is computed as follows:  (Percentage of 15-years-olds students that are PISA low achievers in the bottom quartile of the index of economic, social and cultural status) – (Percentage of 15-years-olds students that are PISA low achievers in the top quartile of the index of economic, social and cultural status)  Available every three years	OECD- PISA

<sup>35</sup> OECD Programme for International Student Assessment.

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



code	Commonly agreed information item	Type (EU / NAT - national)	Definition	Breakdowns	Comments	data source
	<b>CONTEXT INFORMATION</b>					
IC-C5	Vaccination coverage		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-C6	Obesity		Young people aged 15-24 with a body mass index of 30 or above	By gender By SES of parents		Eurostat — EHIS
IC-C7	Regular smokers		Share of daily cigarette smokers in the population aged 15-24	By gender By SES of parents		Eurostat — EHIS
IC-C8	Causes of death of young people-suicide		Deaths caused by suicide per 100 000 inhabitants aged 15-24	By gender		Eurostat — Causes of death statistics

## 9. FURTHER DEVELOPMENT OF THE PORTFOLIO OF INDICATORS

The present portfolio document reflects the current situation (i.e. in 2022) 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.

### Social inclusion

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

- 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 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

### 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**

- Mental health of young people – young people (15-24) with depressive syndrome

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This publication reflects the 2022 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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