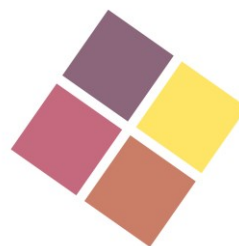


TRAPEZ.ANALYSIS: EU Expert Workshop Vienna, November 8, 2019



TRAPEZ
Transparente
Pensionszukunft
Sicherung der ökonomischen
Unabhängigkeit von Frauen im Alter

Bundeskanzleramt
Bundesministerin für Frauen,
Familien und Jugend

Bundesministerium
Arbeit, Soziales, Gesundheit
und Konsumentenschutz

FORBA

WIFO



Concept Note & Background Info

The Austrian Federal Chancellery, in cooperation with the Austrian Federal Ministry for Labour, Social Affairs, Health and Consumer Protection, the Working Life Research Centre FORBA and the Austrian Institute for Economic Research WIFO, carries out the EU-co-funded project “TRAPEZ – Transparent pension future. Securing women’s economic independence in old age” from 2019-2020. Part of this project is qualitative and quantitative research on the gender gaps in pensions in Austria.

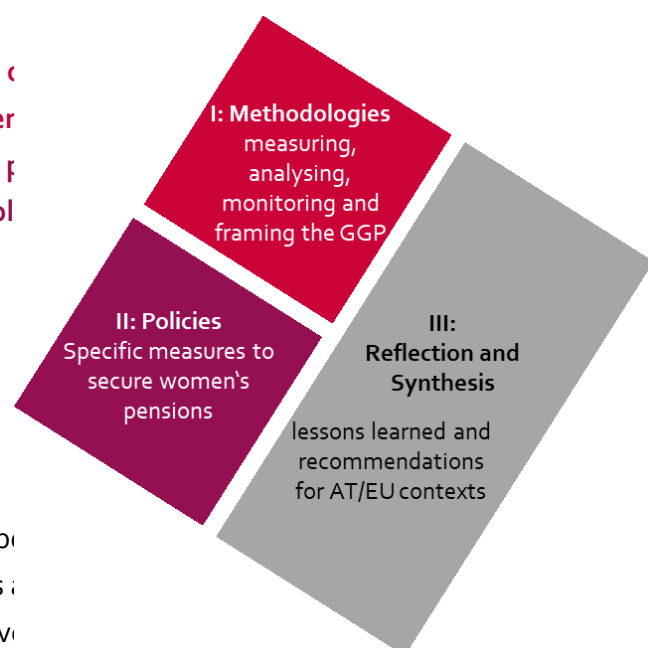
During the EU Expert Workshop, the (preliminary) results of these analyses shall be put in a European context. Methods of calculation for these gaps will be compared and discussed as well as the factors contributing to the gender gap in pensions, and their differences among European countries.

The discussion and reflection with experts from other EU-member states will contribute to the development of recommendations and possible options for further action, both for Austria and the EU. Two selected countries – Germany and Sweden – with different systems and arrangements between the 1st, 2nd and 3rd pillar of pension systems will be included in the synthesis of recommendations and lessons learned from measures and policies implemented in other countries and contexts.

The one-day workshop comprises two sessions – **session I on methodologies and framings of indicators for the gender pensions**, and **session II on labour market measures and policies targeting women’s economic independence in old age**.

In addition to the international experts, experts from Austrian stakeholders (pension insurance, social partners, PES, counselling services) will be invited to this workshop.

In a third session held the following week, the Austrian experts and stakeholders will discuss and reflect the workshop’s inputs in a synthesis paper with recommendations for the national level.



TRAPEZ is supported by
the Rights, Equality and Citizenship programme
of the European Union

Draft Note as of 2nd August 2019

Methodologies: measuring, analysing, monitoring and framing the Gender Gaps in Pensions

The background

Various indicators on EU and national level are used to measure the gender gap in pensions. Methodological discussions and critique both address valid data sources and composition, as well as the underlying concept of such an aggregated indicator. In the TRAPEZ project, WIFO carries out a calculation and decomposition of the Austrian gap among new entries into the old age pensions and analyses the underlying factors based on administrative data on insurance records. The findings, results and limitations of this approach will be presented and discussed with the international experts. Following the two presentations of the Austrian and EU indicators, all international experts are invited to reflect on the different methodologies and to share brief insights in their own national contexts.

Guiding Questions

- ❖ Which methodologies are used to describe, analyse and monitor the gender gaps in pensions?
- ❖ Which data are used as base for the calculations?
- ❖ Who is calculating and using which indicators – academia, pension insurances, politics, etc.?
- ❖ What are the challenges and opportunities to further develop these indicators and increase their European comparability in the future?
- ❖ How to communicate and frame the measuring of the gender gaps in pensions (methodology, significance) and the extent of the gap itself in light of the methodological critique?

Speakers

Christine Mayrhuber, WIFO, TRAPEZ project

Christine Mayrhuber is a researcher at the Austrian Institute for Economic Research in Vienna. Her areas of work and expertise include labour market, income and social security as well as gender and digitalisation. She leads the quantitative research project within TRAPEZ.

Francesca Bettio, Professor of Economics, Università di Siena

Francesca Bettio is an expert on determinants of gender gaps in pension income. She has a long record of accomplishments at the European Commission, working on matters relating to female labour market and gender equality.



Policies: implementing labour market measures and pension policies to secure women's pensions

The background

Individual pension entitlements are accrued throughout the life cycle, and depend on labour market participation as well as on measures in the pension system itself, i.a. those designed to mitigate (gendered) differences in the distribution of (unpaid) care work and income. This session focuses on experiences from Austria, Germany and Sweden:

Guiding Questions

- ❖ How are the respective national pension systems designed?
- ❖ Which effects do these designs have on women's pensions? Which measures introduced in the past had positive and/or negative consequences for women?
- ❖ Which specific measures to secure women's pensions have been implemented in the pension systems and labour market policies and what effects did they have?
- ❖ Have these measures been evaluated and created based on research? How does the connection and collaboration of academia, government and pension insurances work?
- ❖ Which specific aspects do the measures address (e.g. parenthood, care, interrupted employment careers, age, information and awareness), how are they designed (e.g. splitting, boni, campaigns) and what are the target groups (e.g. women, parents, specific groups, couples)?
- ❖ Are the 2nd and 3rd pillar of old-age security system used, promoted or specifically adjusted to secure women's independence in old age?

Speakers

Ingrid Mairhuber, FORBA, is a senior researcher at FORBA (Vienna, Austria) focusing on gender, labour and social issues. She leads the qualitative study project within TRAPEZ.

Michael Reingruber, BMASGK, works as policy officer for general pension affairs at the Austrian Ministry for Labour, Social Affairs, Health and Consumer Protection, and leads the evaluation project within TRAPEZ.

Simone Scherger, Universität Bremen (Germany), is professor of sociology at SOCIUM Research Center on Inequality and Social Policy. Her research and publications deal with questions around life courses and old age, social policy, employment, and the related inequalities. She is a member of the current pension commission of the Federal Government of Germany.

Ann-Charlotte Ståhlberg, Stockholms Universitet (Sweden), is professor of economics at the Swedish Institute for Social Research and served as expert in a number of public investigations on pensions and welfare state. Her research also includes the areas of gender and social security.





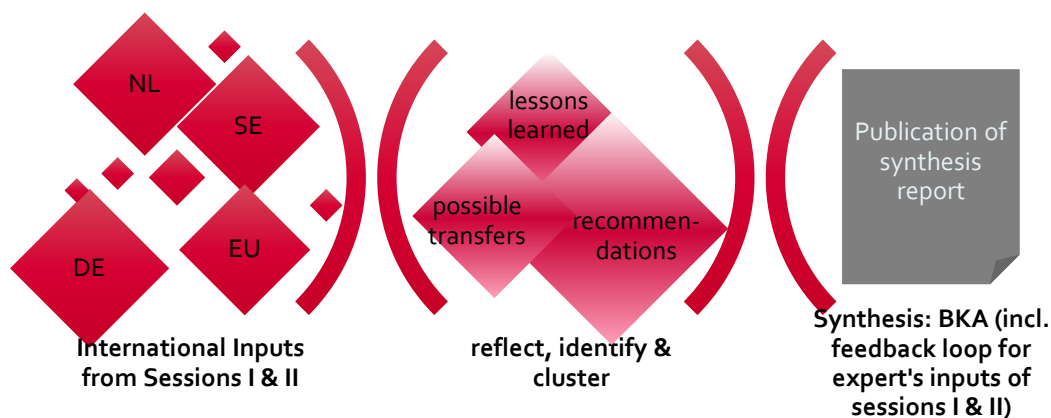
Session III: Reality Check for Austria:
Lessons Learned and Recommendations
Tuesday, 12 November 2019

III:
Reflection &
Synthesis

Austrian experts, stakeholders and multipliers from social partner organisations, pension insurance and counselling institutions will be invited to take part in the EU Expert workshop's sessions I and II. Session III on reflecting the international experiences and identifying lessons learned will be held only with these Austrian experts in the following week.

Based on the presentations and discussions with the European experts (session I and II), participants of session III will be invited to discuss:

- ❖ Which of the international experiences could be transferred to Austria, and to what extent?
- ❖ What can be learned from the international challenges and setbacks to possibly avoid them in the Austrian context?
- ❖ What could be the timeframe and specific policy design for an implementation in Austria?



Output: Publication of synthesis paper

In the framework of the TRAPEZ.project an online publication of the workshop's presentations and outcomes is planned. As speakers, we therefore invite you to send us your presentations and/or minutes to be included in this online publication. This short online publication will present the essence of your inputs (situation, frameworks, measures in your country) in Section 1 as well as the recommendations and reflections during the workshop's discussions in Section 2.

You will be invited to share your feedback on the first draft of Section 1 at the End of November, before the synthesis report will be published in December 2019.

Additionally, and only upon your approval, we will publish your presentations online at the project's website www.trapez-frauen-pensionen.at. Please note, that we will share your presentations with the European Commission for documenting purposes of our project's activities.

Some of the discussion's outcomes (i.e. recommendations; references to your inputs) will also be included in the final report of TRAPEZ.ANALYSIS, which is to be published until January 2020.





Programme

- 9:00** **Registration, Arrival and Welcome Coffee**
- 9:30** **Welcome and Introduction**
- 9:45 - 10:15** **The Gender Gap in Pensions in Austria – Findings from TRAPEZ.ANALYSIS** *Christine Mayrhuber (WIFO)*
- 10:15 - 10:45** **A European perspective on the GGP** *Francesca Bettio (Univer*
- 10:45 - 11:15** **Discussion, Q&A: Methodologies and how to communicate indicators.**
- 11:15 - 11:30** **Coffee Break**
- 11:30 - 12:15** **Austria: the public pension system & women's knowledge and personal strategies – Policies and findings from TRAPEZ.ANALYSIS** *Michael Reingruber (BMASGK), Ingrid Mairhuber (FORBA)*
- 12:15 - 13:45** **Working Lunch Break**
- 13:45 - 14:15** **Sweden** *Ann-Charlotte Ståhlberg (University of Stockholm)*
- 14:15 - 14:45** **Germany** *Simone Scherger (University of Bremen)*
- 14:45 - 15:00** **Coffee Break**
- 15:00 - 16:00** **Discussion, Q&A: How were successful policies implemented?**
- 16:00 - 16:30** **Wrap-up, Next Steps and Reflection, Farewell**
- 16:30 - 17:30** **Informal *aperitivo***

**Session I:
Methodologies**

**Session II:
Policies**

Working language: English

Venue: Dachfoyer (rooftop foyer), Staatsarchiv, Minoritenplatz 1, 1010 Vienna





Practical Info

For each expert, a maximum of 400 Euros can be reimbursed for travel and accommodation costs.

We strongly encourage you to travel as climate neutral as possible, e.g. by taking night trains (schedules may be found online at www.oebb.at/en), avoiding multi-stop flights and using public transport to and from train stations/airports.

1st and 2nd class train or bus tickets and economy flight tickets are eligible for reimbursement.

The workshop's venue at Minoritenplatz 1, 1010 Vienna is located in the city centre, easily reachable by public transport.

Please find more detailed information on reimbursement, venue, recommended hotels etc. in the attached practical information and the reimbursement template.

We remain at your disposal for any questions.

Please do not hesitate to contact us at int.frauen@bka.gv.at.

