

Methodological notes

1. Data collection was performed based on the questionnaires filled in by National House of Public Pensions (for state social insurance and farmers pensioners), Ministry of Defence, Ministry of Internal Affairs, Romanian Intelligence Service, Ministry of Culture, Insurance House of Lawyers.

2. Concepts and definitions

The total average number of pensioners includes the total pensioners from Romania, by any pension system, i.e. public system of pensions (including social support – type of pension, IOVR - disabled, veterans and war widows) and the systems not integrated into the public pension system (social insurance pensioners from the records of the Lawyers' Insurance House, the own social insurance systems of the cults recognized by law). The indicator is computed by dividing the total number of monthly paid pensioners at the number of months from the reference period.

- **Average number of social insurance pensioners** includes:
 - state social insurance pensioners;
 - pensioners from the former insurance system for farmers;
 - social insurance pensioners from Ministry of National Defence, Ministry of Internal Affairs, Romanian Intelligence Service;
 - social insurance pensioners from State Secretariat for Cults;
 - social insurance pensioners from Insurance House of Lawyers.
- **Average monthly pension** is determined based on all amounts of pensions for all categories of pensioners – social insurance pensions, invalidity pensions, survivors pensions etc.- paid by Pensions Houses mentioned above, and is computed by dividing the entitled amounts of the paid pensioners from the reference quarter/year by the average monthly number and, also, divided by 3 (months), and, respectively 12 (months)

By category, pensions are classified as follows:

- old age pension,
 - anticipated old age pension,
 - partial anticipated pension,
 - disability pension,
 - survivor pension,
 - pension-type social assistance,
 - IOVR pensions.
- **Old-age pension** is granted to persons who meet, cumulatively, on the date of retirement, the conditions regarding the standard retirement age and the minimum period of contributions or in the specialty, as the case may be, provided for by Law no. 263/2010.
 - **Anticipated old age pension** is granted, with at least 5 years before reaching the standard retirement age, to persons whose contribution period is at least 8 years bigger than the complete contribution stage according to the Law no. 263/2010.
 - **Partial anticipated pension** is granted, with at least 5 years before reaching the standard retirement age, to persons whose contribution stage is complete and, also, to those who exceeded the complete contribution stage of up to 8 years.
 - **Disability pension** is granted to persons who have completely lost or at least half of the capacity to work because of conditions specified by the law in force.
 - **The survivor pension** is granted to children and surviving spouse if the deceased breadwinner was retired or meeting the conditions for obtaining a pension.

Children have the right to the survivor pension:

- a) until the age of 16;
- b) if they continue their studies in an organized education form, up to graduation, without exceeding the age of 26 years;
- c) throughout the period of disability of any degree, if it occurred in the period when they were in one of the categories mentioned above at a) or b).

- **IOVR pensions** are granted to disabled and injured war, survivors of the dead or missing in the war and as well, to survivors of former disabled retirees and injured war and are established according to the Law no. 49/1999 regarding the IOVR pensions.
- **Social support - type of pension** is paid from the Social Insurance State Budget, this type of pension being paid under Law no. 27/1966 regarding the state social insurance pensions and supplementary pension, normative act repealed.
- **The pension** represents the right monetary established by the pension decision; **the average nominal net pension** for computing the real pension is established by deducting the tax and the health social insurance contributions from the amounts representing the pensions. According to EGO 130/2021 on some fiscal-budgetary measures, the contribution for health insurance will be collected only for persons who have pensions exceeding 4000 lei. The tax on pension income will be established by deducting from the pension income the monthly non-taxable amount of 2000 lei and, as the case may be, the social health insurance contribution due.
- **The number of pensioners, beneficiaries of social indemnity** (social minimum guaranteed pension) represents the number of pensioners from the pension system for whom the level of entitled pension is under the level of social indemnity established by EGO no 6/2009. EGO no. 168/2022 sets the level of social indemnity for pensioners at 1125 lei starting with January 1, 2022. According to art.7 of the Law no.118 / 2010 "... within the legal acts in force, the term guaranteed minimum social pension is replaced by the term social indemnity for pensioners" and from 1 March 2017, EGO no.6 /18.02.2009 was updated, with the introduction of social indemnity for pensioners in the military system, as well.
- **Issuance of social vouchers in the amount of 250 lei**, also through the "Support for Romania" package, for pensioners from the public pension system, pensioners registered in sector pension houses and beneficiaries of rights provided by special laws, paid by territorial pension houses / sectoral pension houses, whose net monthly income is less than or equal to 1500 lei. Social vouchers will be awarded once every two months.
- **Financial aid** to pensioners of the public pension system, pensioners of the state military pension system and beneficiaries of rights provided by special laws paid by territorial pension houses/sectoral pension houses whose monthly income is less than or equal to 3,000 lei according to GEO 168/2022.
- Social health insurance contributions are no longer withheld for pension income, for the part that exceeds the monthly amount of 4,000 lei, by Decision CCR 650/2022, published in the Official Gazette of December 28, 2022.
- Reimbursement of social health insurance contributions for the period January 1, 2022 - December 27, 2022 inclusive, according to GEO no. 4/2023 for pension income, for the part that exceeds the monthly amount of 4,000 lei.
- **Real pension** expresses the equivalent of goods and services that can be purchased or used with the average nominal net pension in a certain period of time, compared to other periods, given the evolution of consumer prices and service tariffs. The indicator is determined taking into account the amounts for pensions paid to pensioners from state social insurance and to those from Ministry of National Defence, Ministry of Internal Affairs, Romanian Intelligence Service
- **Real pension index** is calculated as ratio between the nominal pension (for calculation of real pension) and consumer price index.