

## Funded Pensions Indicators Indicateurs sur les pensions par capitalisation

Dataset: Pension indicators

Source

Contact person/organisation

Daf.Contact@oecd.org

Data source(s) used

The Global Pension Statistics' project is compiled on the basis of various national administrative sources (e.g. data are reported by pension supervisory authorities, financial market authorities, ministries of finance, or national statistical offices).

Data Characteristics

Variables collected

Data collected within the framework of this project pertains to assets, asset allocation, liabilities, income, expenditure, membership and number of funds.

Periodicity

Yearly

Reference period

Data for all countries refer to the calendar year running from 1st of January to 31st of December, with some exceptions: Australia where the reference period is the financial year ending in June; India where the reference period ends in March for Employees' Provident Fund, Employees' Pension Scheme and Employees' Deposit Linked Insurance Scheme; and New Zealand (before 2014). Data for New Zealand up to 2013 are based on a 31 March balance date for most of the schemes.

Concepts Classifications

Key statistical concept

Data include pension funds per the OECD classification by type of pension plans and by type of pension funds. All types of plans are included (occupational and personal, mandatory and voluntary). The OECD classification considers both funded and book reserved pension plans that are workplace-based (occupational pension plans) or accessed directly in retail markets (personal pension plans). Both mandatory and voluntary arrangements are included. The data include plans where benefits are paid by a private sector entity (classified as private pension plans by the OECD) as well as those paid by a funded public sector entity. A full description of the OECD classification can be found at: <http://www.oecd.org/dataoecd/0/49/38356329.pdf>. Pension funds include also funds for government workers in the United States. The coverage of the statistics follows the regulatory and supervisory framework. All authorised pension funds are therefore normally covered by the Global Pension Statistics exercise. Assets pertaining to reserve funds in social security systems are excluded.

Other Aspects

Recommended uses and limitations

Pension fund and plan types are classified according to the OECD classification. Three dimensions cover this classification: pension plan type, definition type and contract type. Not all combinations of those dimensions produce a result. The following lines present the combinations that can be set by users.

- Occupational pension plans / Defined benefit / Pension funds - Occupational pension plans / Defined benefit / Book reserve - Occupational pension plans / Defined benefit / Pension insurance contracts - Occupational pension plans / Defined benefit / Total all funds - Occupational pension plans / Defined contribution / Pension funds - Occupational pension plans / Defined contribution / Pension insurance contracts - Occupational pension plans / Defined contribution / Investment companies managed funds - Occupational pension plans / Defined contribution / Banks managed funds - Occupational pension plans / Defined contribution / Total all funds - Occupational pension plans / Total, by definition type / Pension funds - Occupational pension plans / Total, by definition type / Book reserve - Occupational pension plans / Total, by definition type / Pension insurance contracts - Occupational pension plans / Total, by definition type / Investment companies managed funds - Occupational pension plans / Total, by definition type / Banks managed funds - Occupational pension plans / Total, by definition type / Total all funds

- Personal pension plans / Defined contribution / Pension funds - Personal pension plans / Defined contribution / Pension insurance contracts - Personal pension plans / Defined contribution / Investment companies managed funds - Personal pension plans / Defined contribution / Banks managed funds - Personal pension plans / Defined

contribution / Total all funds - Personal pension plans / Total, by definition type / Pension funds - Personal pension plans / Total, by definition type / Pension insurance contracts - Personal pension plans / Total, by definition type / Investment companies managed funds - Personal pension plans / Total, by definition type / Banks managed funds - Personal pension plans / Total, by definition type / Total all funds

- Total, by pension plan type / Defined benefit / Pension funds - Total, by pension plan type / Defined benefit / Book reserve - Total, by pension plan type / Defined benefit / Pension insurance contracts - Total, by pension plan type / Defined benefit / Total all funds - Total, by pension plan type / Defined contribution / Pension funds - Total, by pension plan type / Defined contribution / Pension insurance contracts - Total, by pension plan type / Defined contribution / Investment companies managed funds - Total, by pension plan type / Defined contribution / Banks managed funds - Total, by pension plan type / Defined contribution / Total all funds - Total, by pension plan type / Total, by definition type / Pension funds - Total, by pension plan type / Total, by definition type / Book reserve - Total, by pension plan type / Total, by definition type / Pension insurance contracts - Total, by pension plan type / Total, by definition type / Investment companies managed funds - Total, by pension plan type / Total, by definition type / Banks managed funds - Total, by pension plan type / Total, by definition type / Other - Total, by pension plan type / Total, by definition type / Total all funds