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EUROPEAN SOCIAL CHARTER

Addendum to the
12th National Report on the implementation
of the European Social Charter

submitted by

THE GOVERNMENT OF SWEDEN

(Article 23 for the period
01/01/2008 – 31/12/2011)

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Question addressed to Sweden, Article 23 (Right of elderly persons to social protection)

The basic protection in the Swedish pension system consists of four benefits: guarantee pension, housing supplement for pensioners, special housing supplement and maintenance support for elderly.

Guarantee pension

Those who have a small or no income related old age pension (income pension, premium pension, supplementary pension) receive a guarantee pension. The guarantee pension is based on how many years a person has been resident in Sweden, for full guarantee pension 40 years of residence is needed. For every year less than 40 a person has been resident in Sweden the guarantee pension is reduced proportionally. If a person has 20 years of residence he or she will have 20/40 of full guarantee pension. The guarantee pension is reduced by the income related old age pension benefits and it is a complement to those. Full (40/40) and, by income related pension, unreduced guarantee pension amounts to SEK 7 810 a month (2012) for a single person and to SEK 6 967 a month (2012) for married persons.

Guarantee pension is price indexed. The guarantee pension is taxable and it is financed from the Central Government budget.

Housing supplement for pensioners

Housing supplement for pensioners is subject to means testing and is affected by housing costs, income and capital. The size of the living area is of no importance. The housing supplement amounts to 93 per cent of housing costs up to SEK 5 000 a month for single persons with an addition of SEK 340 per household. Housing costs for a person who is married is half of the couple's joint housing costs, that is up to SEK 2 500 a month with an addition of SEK 340 per household. Thus, the highest housing supplement that may be disbursed is SEK 4 990 a month for a single pensioner and SEK 2 495 for a person who is married. Housing supplement is reduced in accordance with special rules depending on the individual's and any partner's capital, pension income, earned income, income from capital, etc. The amount is tax free and the benefit is financed from the central government budget.

Special housing supplement

If the pensioner's income after deduction for tax and reasonable housing costs is under an acceptable level (standard of living), a special housing supplement may be granted. This benefit applies mainly to those with high housing costs and low pensions. A reasonable housing cost is at most SEK 6 200 a month for a single person and SEK 3 100 a month for a pensioner who is married. The established reasonable standard after housing costs and tax has been

paid corresponds to about SEK 4 967 a month in 2012 (1,3546 price base amounts) for a single person and about SEK 4,197 a month in 2012 (1,1446 price base amounts) for those who are married. The benefit is tax free and the benefit is financed from the central government budget.

Maintenance support

Person residing in Sweden and aged over 65 years who have a small or no old age pension are to be guaranteed a reasonable standard of living through the maintenance support. The amount of the support payable depends on the beneficiary's income, housing cost and capital. The support guarantees a reasonable standard of living and a compensation for reasonable housing costs (up to SEK 6 200 a month for a single person and up to SEK 3 100 a month for a married person). The support is tax free and the benefit is financed from the central government budget.