

## COUNTRY NOTE

Database on Social Expenditure ([www.oecd.org/social/expenditure.htm](http://www.oecd.org/social/expenditure.htm))  
OECD - Social Policy Division - Directorate of Employment, Labour and Social Affairs

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## SWEDEN

### *Nomenclature*

ATP	Adjustment supplements to pensioners
KBT	Municipal housing supplement

### *Monetary unit*

Social spending is expressed as millions of Swedish kronas (SEK).

### *General notes*

The Swedish social security system, except for unemployment insurance, comes under the jurisdiction of the Ministry of Health and Social Affairs. This insurance system includes: sickness and parental insurance (sjuk- och föräldraförsäkring), old-age pension (ålderspension), survivors' pension (efterlevandepension), disability pension (förtidspension), part-time pension (delpension) and work injury insurance (arbetsskadeförsäkring). Irrespective of nationality, residents from age 16 onwards are registered with the insurance authorities.

The unemployment insurance comes under the jurisdiction of the Ministry of Industry, Employment and Communication (Näringsdepartementet). It consists of two parts: a basic allowance and optional income-related benefit. The basic allowance covers persons over 20 years of age who are not optionally insured. Both parts are mainly financed by contributions from the employer. The optional income-related benefit is voluntary but members of different trade unions collectively join the insurance.

Municipalities are responsible for service delivery, as for example, child care and health care (excluding medical treatment), after-care and rehabilitation or certain types of accommodation.

The individual country notes of the OECD Benefits and Wages ([www.oecd.org/social/benefits-and-wages.htm](http://www.oecd.org/social/benefits-and-wages.htm)) provide a comprehensive description of characteristics of social programmes (e.g. conditions for receipt, calculation of payment rates, tax treatment of social support, benefit duration, etc.) for the working-age population, including: unemployment insurance and assistance, social assistance, employment-conditional benefits, housing benefits, family benefits, childcare support, and support for sole parent households.

### *Break in series*

Data for 1993 onwards have been provided by the ESSPROS methodology format.

### *Secretariat estimates:*

5.2.1.2 Child care (pre-primary education) is estimated since 2012 based on Statistics Sweden.

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### *Sources*

Ministry of Health and Social Welfare until 1992.

Data provided by EUROSTAT (ESSPROS database) from 1993, except for:

**1980 onwards**            4. Health: OECD Health Statistics ([www.oecd.org/health/healthdata](http://www.oecd.org/health/healthdata))

**1998 onwards**            5.2.1.2 Childcare (pre-primary education): OECD Education database

**1980 onwards**            6. ALMP: OECD Labour Market Policy database.

(See Table “Passage from ESSPROS to SOCX” next page).

### *Background information*

European Social Statistics, Social Protection, ESSPROS qualitative information

<http://ec.europa.eu/eurostat/web/social-protection/data/qualitative-information>

MISSOC, Mutual information system on social protection in the Member states of the European Union and of the European Economic Area (<http://ec.europa.eu/social/main.jsp?catId=815&langId=en>)

Statistics Sweden, Social Protection Expenditure and Receipts in Sweden and Europe

1998-2003    2000-2005    2004-2009


Försäkringskassan (2006) (Swedish Social Insurance Agency), The Scope and Financing of Social Insurance in Sweden 2004–2007

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**Passage from Esspros to SOCX (public / mandatory-voluntary private)**

**SWEDEN, in millions of Swedish Kronas**

		ESSPROS / SOCX	Code	1995	2000	2010	2015	2016	2017	2018	2019	
(1)		<b>ESSPROS</b>	<b>Social protection benefits</b>	<b>1100000</b>	<b>601,336</b>	<b>660,921</b>	<b>993,443</b>	<b>1,208,534</b>	<b>1,272,665</b>	<b>1,301,996</b>	<b>1,337,225</b>	<b>1,366,646</b>
-	(2)	- ESSPROS	Disability Economic integration of the handicapped	1121114	2,089	1,491	766	1,291	1,251	960	781	690
				1121122	0	0	0	0	0	0	0	0
				1122114	0	0	0	0	0	0	0	0
				1122122	0	0	0	0	0	0	0	0
-	(3)	- ESSPROS	Sickness Benefits in kind	1111200	102,094	131,417	213,032	257,130	269,224	280,657	298,128	311,177
				1112200	0	0	0	0	0	0	0	0
-	(4)	- ESSPROS	Unemployment Cash - Vocational training allowance	1161114	14,001	8,333	15,554	17,058	17,121	17,344	15,017	12,888
				1161121	0	0	0	0	0	0	0	0
				1162114	0	0	0	0	0	0	0	0
				1162121	0	0	0	0	0	0	0	0
			Benefits in kind	1161200	9,669	7,533	9,069	12,246	12,989	13,475	12,138	9,379
				1162200	0	0	0	0	0	0	0	0
+	(5)	SOCX / Health	HEALTH Public benefits in kind	752.10.4.0.0.0	108,983	136,661	223,481	273,489	285,411	298,444	318,136	331,450
+	(6)	SOCX / Statistics Sweden	FAMILY Services Child care (pre-primary education)	752.10.5.2.1.2	m	7,053	17,706	22,140	23,318	24,533	25,670	26,954
+	(7)	SOCX/ ALMP	ACTIVE LABOUR MARKET PROGRAMMES	752.10.6.0.0.0	39,364	38,964	39,124	53,143	51,414	52,029	53,639	51,306
-	(8)	<b>= SOCX</b>	<b>MANDATORY PRIVATE SOCIAL EXPENDITURE</b>	<b>752.20.90.0.0.0</b>	<b>6,100</b>	<b>12,100</b>	<b>12,302</b>	<b>17,382</b>	<b>18,234</b>	<b>18,340</b>	<b>19,475</b>	<b>20,199</b>
		ESSPROS	SICKNESS (1111111 Paid sick leave: 13. Arbetsgivarens sjuklön (Employers' sick pay)	752.20.3.1.3.1	6,100	12,100	12,302	17,382	18,234	18,340	19,475	20,199
-	(9)	<b>= SOCX</b>	<b>VOLUNTARY PRIVATE SOCIAL EXPENDITURE</b>	<b>752.30.90.0.0.0</b>	<b>40,096</b>	<b>46,312</b>	<b>102,673</b>	<b>145,157</b>	<b>148,768</b>	<b>156,241</b>	<b>158,115</b>	<b>160,200</b>
		ESSPROS	(several functions) 14. Avtalspensioner (Contractual pensions)		40,096	46,312	99,304	139,927	142,799	150,222	151,477	155,959
+	(10)	SOCX / Health	HEALTH Voluntary private insurance, benefits in kind	752.30.4.2.0.0	a	a	3,369	5,230	5,969	6,019	6,638	6,359
<b>=</b>	(11)	<b>SOCX</b>	<b>PUBLIC SOCIAL EXPENDITURE</b>	<b>752.10.90.0.0.0</b>	<b>575,634</b>	<b>636,414</b>	<b>923,727</b>	<b>1,112,272</b>	<b>1,171,190</b>	<b>1,196,004</b>	<b>1,237,654</b>	<b>1,266,064</b>

Notes:

- (1) "ESSPROS / Social protection benefits" are Total ESSPROS expenditures (1000000) less Administration costs (1200000) and other expenditure (1400000, property income and other).
- (2) The ESSPROS data within "Disability / Economic integration of the handicapped" are not included in SOCX database to avoid double counting with SOCX "Active Labour Market Programmes / Measures for the disabled".
- (3) The ESSPROS data within "Sickness / Benefits in kind" are not included in SOCX database to avoid double counting with SOCX "Health / Benefits in kind".
- (4) The ESSPROS data within "Unemployment / Cash Vocational training allowance" "Unemployment / Benefits in kind" are not included in SOCX database to avoid any double counting with SOCX "Active Labour Market Programmes".
- (5) SOCX Health benefits in kind are from "OECD Health Data ([www.oecd.org/health/healthdata](http://www.oecd.org/health/healthdata))".
- (6) SOCX includes public spending on pre-primary education from OECD education database, unless such data are already included in "5.2.1. Day care services".
- (7) SOCX Active Labour Market Programmes are from "OECD database on labour market programmes".
- (8) Spending on some programmes recorded under the schemes below are categorised as Mandatory private in SOCX.
- (9) Spending on some programmes recorded under the schemes below are categorised as Voluntary private in SOCX. (9) Includes (10).
- (10) SOCX Private insurance Health benefits in kind are from "OECD Health Data ([www.oecd.org/health/healthdata](http://www.oecd.org/health/healthdata))".
- (11) = (1) - (2) - (3) - (4) + (5) + (6) + (7) - (8) - (9) + (10)

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<b>Code</b>	<b>Title of the programme</b>	<b>Description of the programme and attached notes</b>
<b>1.</b>	<b>OLD AGE</b>	
752.10.1.1.1.1	Basic pension	The old age pension is normally paid as of the month in which the person turns 65. It is possible to receive payments earlier, the minimum age is 61, or to postpone receipt until the age of 70 at the latest. The old age pension is payable at 100, 75, 50 or 25 per cent of the basic daily social insurance payment. The basic pension is paid to all pensioners regardless; while the pension paid under the ATP-scheme depend on contributory record. ATP pension payments amount to 60 % of the average income over the best 15 years of one's working life, provided the applicant has been resident in Sweden for the 40 years.
752.10.1.1.1.5	Supplementary pension (ATP)	The pension supplement is payable to persons who receive a low supplementary pension payment or none at all. The supplement can be received in conjunction with old age pensions, permanent/temporary disability pensions, adjustment pensions and extended adjustment pensions (see survivors), special survivor's pensions and widow's pensions. Since 1995, ATP is financed through a special contribution from employers and self-employed persons and a general contribution from employees.
752.10.1.1.1.6	Income pension fund (non means-tested)	<p>This benefit replaces the old age pension, national supplementary pension for persons who are born 1937 and before and who do have claims on the old pension system. According to transition rules, persons born between 1938 and 1953 will as well receive part of their total pension according to the rules of Supplementary pension. The level of this pension benefit has been reconstructed in such a way that it includes both the value of the old flat rate basic pension and the level of the old supplementary pension. For a full supplementary pension there must be 30 years with earned pension points. For each year missing, the payable amount is reduced with 1/30.</p> <p>This benefit replaces the basic and the supplementary pension in the old pension system and is paid for the first time January 2001. The benefit covers persons born in 1938 and after, who have made payments to the new pension system (have had taxable income). The retirement age is flexible and individuals can claim payment from age 61. The system is based upon lifetime contributions. All years with earnings are equal important for the level of the Income pension. Leaving early implies a lower pension compared with a later retirement age.</p>
752.10.1.1.2.1	Partial pension	Employees aged 61 to 64 who are engaged in can choose to reduce their working hours and receive a partial pension. Payment amounts to 55% of the difference between income before and after the reduction in working hours (compensation is only paid for reductions in working hours up to a maximum of 10 hours per week). A partial-pension recipient may work between 17 and 35 hours a week on average.
752.10.1.2.1.1 and 752.10.1.2.1.3	Accommodation for the elderly	The municipalities have the responsibility to ensure that older persons are enabled to live independently, in secure conditions and with respect shown for their self-determination and privacy. The municipality shall endeavour to ensure that older persons obtain good housing and shall establish special forms of accommodation, to provide service and nursing for older persons in need of special support. The accommodation service in this scheme is directly produced by the municipalities.
752.10.1.2.1.2 and 752.10.1.2.1.4	Assistance in carrying daily tasks	See above.

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752.30.1.1.1.1	Contractual Pensions	Add description
752.30.1.1.1.2	Old age Pensions to former civil servants	These pension expenditures are estimates of the expenditures that the local and central government pay for former employees when they choose to use their right to pension benefits. Other remaining contractual benefits can be included in "pension expenditure" paid by the government sector. These are: Paid sick leave, Disability pension, Survivors' pension or Full unemployment benefit.
752.30.1.1.2.1	Early old age pension (non means-tested)	At the legal (common) age of 65, persons become pensioners but at the ages between 60-65 they can chose to work part-time or became a pensioner as well, all called anticipated pension. The law has been changed so now all have the right to work until they get to the age of 67.
<b>2. SURVIVORS</b>		
752.10.2.1.1.1	Basic widow's pension	Includes adjustment pension, extended adjustment pension, special survivor's pension, and widow's pension. Adjustment pension is payable to surviving spouses not yet 65 years of age (payments depend on the contributory record of the deceased spouse). An extended adjustment pension is granted if the survivor has custody of a child under 12. Special survivor's pension is an income-tested payment. Women whose husbands died before 1990 receive a widow's pension instead of adjustment pension.
752.10.2.1.1.2	Supplementary pension (ATP)	See above.
752.10.2.1.1.8	Income based survivors pensions scheme	This includes :  1) Income based survivor's pension, which is based on the pension capital of the deceased. Pension capital is calculated from the sum of earned income during lifetime and for the time after death assumed income until the deceased should have reached the age of 64. This item includes from 2003 onwards : adjustment pension, income based widow's pension  2) Income based child pension, which is based on the deceased's pension capital, in the same way as adjustment pension for adults. Income based child pension is payable to children under 18 who have lost one or both parents. If pursuing an education, the child pension can be extended to the month of June in the year the child turns 20. Income based child pension is paid with 35 per cent of each deceased parent's income pension if the child is under twelve.
<b>3. INCAPACITY-RELATED BENEFITS (Disability, Occupational injury and disease, Sickness)</b>		
752.10.3.1.1.0	Basic pension	Permanent or temporary disability pensions are paid to those aged between 16 and 64, whose ability to work is medically impaired by at least one quarter of normal work capacity. Temporary disability pension is payable this concerns a period of 1 to 3 years. Compensation is paid in the form of a basic pension and a supplementary pension (ATP – see Above).
752.10.3.1.1.4	Supplementary pension (ATP)	Income-tested supplement to Basic incapacity pensions.
752.10.3.1.1.5	Disability pension (National health insurance)	This includes :  1) Activity compensation - income related part: This benefit replaces since 2003 part of the benefit Disability pension, national supplementary pension (752.10.3.1.1.4). The income related part of Activity compensation is granted to persons between the age of 19 and 29, who have had a pension carrying income for at least one year before the insurance case and whose working capacity is reduced for medical reasons with at least 25 %. The size of the benefit will amount to 64 per

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	cent of the calculated average yearly income
	<p>2) Sickness compensation - income related part: This benefit replaces part of the benefit Disability pension, national supplementary pension (752.10.3.1.1.4). The income related part of Sickness compensation is granted to persons from the month they turn 30, if they have had a pension-carrying income for at least one year before the insurance case, if their working capacity is reduced for medical reasons with at least 25 %. The size of the compensation will amount to 64 per cent of the calculated average yearly income.</p>
752.10.3.1.2.1 Work injuries insurance (disability pension)	The right to a so-called work injury annuity is normally only payable if an approved work injury has led to a lasting reduction in a person's earning ability for at least one year. Earning capacity has to have been reduced with at least 1/15. The annuity is designed to compensate the recipient for all lasting loss of income.
752.10.3.1.3.1 Work injuries insurance (paid sick leave)	Financed through social contributions from employers. It includes spending in case of work-related injuries and accidents and work-related travel accidents, and injuries during military service. There is no fixed list of "occupational diseases".
752.10.3.1.4.1 Sickness cash benefit	During the 1990s sickness benefit regulations were changed repeatedly, but since 1 January 1998, sickness benefit compensation is 80 per cent of relevant income, with the exception of the waiting day.
752.10.3.2.1.1 Accommodation for the disabled	The municipalities have the responsibility to ensure that persons who, for physical, mental or other reasons encounter difficulties in their everyday lives, are housed in a manner appropriate to his/her need of special support. The municipality shall establish homes with special service for those who are in need of such accommodation.
752.10.3.2.1.2 Assistance in carrying daily tasks	<p>This includes :</p> <p>1) Assistance allowance : payable to people under 65 who suffer from autism, mental handicaps, significant functional disabilities after brain damage, or other major and lasting disabilities not due to normal ageing. However, persons living in sheltered group accommodation or institutions owned by the central government are not entitled to the allowance. If there are special reasons, the allowance can be paid for a short time, while the person is in hospital. The allowance from the social insurance office to the functionally impaired is designed to be used for the employment of personal assistants who can help them in their daily lives. The disabled person may employ one or several assistants themselves, or turn to those available from the municipality or other organisations. Assistance allowance is paid at a standard amount per hour.</p> <p>2) Support to disabled persons in their ordinary homes : The municipalities have the responsibility to ensure that persons who, for physical, mental or other reasons encounter difficulties in their everyday lives, are enabled to participate in the life of the community and to live like others. The municipality shall ensure that the individual receives support in his/her everyday life according to each persons needs. Under this benefit all activities are recorded according to the legislation in SoL and LSS, who are given to individuals living in their ordinary homes. The service can be produced either by the municipality or by a private entrepreneur on behalf of the municipality.</p>
752.10.3.2.2.1 Rehabilitation (sickness insurance)	Includes spending on rehabilitation cash benefit, special allowance, purchase of work-related rehabilitation services, allowance for working conditions aid, and special payments for rehabilitation and treatment.

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<b>4. HEALTH</b>		
752.10.4.2.0.0	Public expenditure on health	<i>See OECD Health Statistics.</i>
<b>5. FAMILY</b>		
752.10.5.1.1.0	Family allowances	Family allowances consist of basic, extended and additional child allowances. All parents are entitled to basic child allowance until the child turns 16. After this, the parent may receive so-called extended child allowance for as long as the child is attending compulsory school or the equivalent. Child allowances are tax-exempt and vary with the size of the family. It was raised several times in the 1990s to SEK 11,400 per child in 2001. A "large family" supplement begins at the third child and is worth 25% of the first child allowance for the third child, 80% for the fourth and 100% for the subsequent children.
752.10.5.1.2.0	Maternity and parental leave	Parental cash benefit for the birth or adoption of a child may be paid for a total of 450 days per child. Parents sharing custody are each entitled to half of the total number of benefit days. Parental cash benefit can be received until the child turns eight. Since 1 January 1998, the level of compensation is 80% of relevant income subject to a certain maximum.
752.10.5.2.1.1	Child care	Child day care is a group activity for children whose parents have a gainful occupation outside home or are students and for children who are in need of group activities together with other children. It is open during the whole year and the opening and closing hours are generally adapted to parents working hours. Family child day care is an alternative for children who need to be in smaller groups or who, because of the distance to child day care activities, need an alternative placement.
<b>6. ACTIVE LABOUR MARKET PROGRAMMES</b>		
	See OECD Labour Market Policy database.	
<b>7. UNEMPLOYMENT</b>		
752.10.7.1.1.1	Unemployment benefits	This includes :  1) Income related unemployment benefit and Basic unemployment insurance: The aim is to cover insured workers (members of an approved unemployment insurance unit) and self-employed persons who are unemployed. The insurance provides an income related benefit. Unemployment insurance in Sweden is based on a system of voluntary membership. Unemployment benefits are payable to an unemployed person who has belonged to an unemployment insurance fund for at least twelve months. In addition the applicant must have fulfilled the work condition. This means that she or he must have worked for six months, at least 70 hours per month, normally during a 12-month period preceding unemployment. There is also an alternative work condition which stipulates that the unemployed person must have worked a total of 450 hours (and at least 45 hours per month) for a continuous period of six months. Persons who are unemployed but not a member of an unemployment insurance fund, or who do not satisfy the unemployment insurance conditions for benefit, are entitled to compensation from the so called basic insurance. Apart from being a member of an insurance fund, the qualifying conditions for this type of support are the same as for unemployment benefit.  2) Unemployment insurance: Income-related daily cash benefit from the unemployment office. This benefit is payable to a person who is unemployed, fit for work, listed as a job-applicant at the employment office willing to accept suitable employment, has been a member in an unemployment benefit fund for at least twelve months, has worked at least 80 days during at least 5 months over a period of twelve months just

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prior to unemployment.	
752.10.7.1.1.2 Redundancy compensation	Guaranteed (partial) wage payment in case of enterprise insolvency.
<b>8. HOUSING</b>	
752.10.8.2.1.2 Housing allowance	Housing allowance is designed to enable financially weak households to live in adequate and sufficiently spacious accommodation. Families with children may receive both a special allowance for children living at home and a contribution towards their housing costs. The special allowance for children living at home depends on the number of children and the household's income. The contribution towards housing costs depends on the number of children, the cost of the accommodation, the size of the accommodation and the household's income. For married or cohabiting couples with children, the housing allowance is means-tested on an individual basis. This programme also includes housing allowances for disability pensioners, old-age pensioners, wife's supplement and survivor's pension.
<b>8. OTHER SOCIAL POLICY AREAS</b>	
752.10.9.1.1.1 Social assistance	Social allowance including introductory compensation to refugees and certain other foreign nationals. Through the assistance, the individual shall be assured of a reasonable standard of living. The assistance shall be designed in such a way as to strengthen his resources for independent living. Livelihood support is provided for reasonable expenditure on 1. Food, clothing and footwear, play and leisure, disposable articles, health and hygiene, a daily newspaper, a telephone and a television licence fee 2. Housing, domestic electricity supply, journeys to and from work, household insurance and membership of a trade union and an unemployment insurance fund.