

APPENDIX II

References



Local

Pension Provision in Malta, Watson Wyatt Ltd, 4th August 1998

The Maltese Pension Systems, An Analysis of the Current System and Options for Reform, World Bank, March 2004

Pension Reform Proposals, National Commission for Welfare Reform, 11th October 2003

Situation Report on the Work of the National Commission on Welfare Report, A P Galdes, 27th March 2002

Interim Report, National Commission for Welfare Reform, 24th February 2000

Averting the Pensions Crisis: The Case of Malta, Reno Camilleri, March 1998

Working Document, Office of the Chairman of the National Commission for Welfare Reform, 19th June 2001

Guaranteeing the Future of Social Security In Malta: Facts and Not Myths, Part One, General Workers Union

Starting in the Right Direction Just to Arrive at the Wrong Destination, General Workers Union, 2002

FOI Position Paper on Draft Report of the NCWR, Federation of Industries, April 2002

Comments on the Draft Report of the NCWR, National Association of Pensioners, July 2001

Ensuring the Financial Sustainability of Malta's Social Security System: Modifying the Present System to Ensure its Adequacy in Coming Years, General Workers Union

Labour Force Survey, December 2003, National Statistics Office, 30th March 2004

2002 Demographics Review, National Office of Statistics, 2003

Gross Domestic Product for 2003, National Statistics Office, 8th April 2004

Social Protection In Malta: A Statistical Analysis of Social Protection Accounting 1998 – 2002, National Statistics Office, Malta, February 2004

Tax Regime for Retirement Investment Schemes, Dr Anton Felice, 27th April 2001

Structural, Poverty and Social Exclusion Indicators, National Statistics Office

Economic Survey, January – September 2003, Economic Policy Division, Ministry of Finance and Economic Affairs, 24th November 2003

Special Funds (Regulation) Act 2002, CAP 450, Laws of Malta

Overview of the Registration Requirements under the Special Funds (Regulation) Act 2002, Malta Financial Services Authority

Standard Operational Conditions under the Special Funds (Regulation) Act 2002, Malta Financial Services Authority

General Directives under the Special Funds (Regulation) Act 2002, Malta Financial Services Authority

Social Security Act, Cap 318, Laws of Malta, 1987

Financial Estimates 2004, Ministry of Finance and Economic Affairs

Pension Reform in Malta – Where are we Heading?, Celia Mallia, May 2002

MCESD Explanatory Note regarding the World Bank Proposal on the Reform of the System of Pension in Malta

Lejn Pjan Ta' Rigernerazzjoni Ekonomika u Socjali, Partit Laburista – Awissu 2004, Abozz ta' Dokument Ghad-Diskussjoni

Dissertation: A Study of the Economic Consequences of Aging in the Maltese Islands, Dr Philip Von Brockdorff, University of York, Department of Economics and Related Studies

International

Joint Report by the Commission and the Council on adequate and sustainable pensions, ECOFIN 76, SOC 115, 7165/03, 10th March 2003, Brussels

Simplicity, Security and Choice: Working and Saving for Retirement, Secretary of State for Work and Pensions, UK, December 2002

The Future of Social Security Pensions In Europe, National Bureau of Economic Research, Martin Feldstein, Cambridge MA, September 2001

National Strategy Report: Old Age Pension Provision, Federal Republic of Germany, September 2002

National Strategy Report: The Future of Pension Systems, United Kingdom, September 2002

National Strategy Report: Sustainable and Adequate Pension Provision for an Aging Population, Ireland, September 2002

National Strategy Report: The Danish Pension System, Denmark, September 2002

National Strategy Report: The Netherlands Pension System, Netherlands, September 2002

National Strategy Report: The Future of Pension Systems, Sweden, September 2002

The Swedish Pension Reform Model: Framework and Issues, SP Discussion Paper No: 0012, Edward Palmer, June 2000

A Woman's Model for Social Welfare Reform, The National Women's Council of Ireland, Mary Murphy, Ireland, April 2003

Pensions Reform Proposals: The White Paper, Freshfields Bruckhaus Deringer, UK, June 2003

Report of the High Level Group on the future of social policy in enlarge European Union, Directorate-General for Employment and Social Affairs, May 2004

Guidelines for Pension Fund Governance (OECD Secretariat), July 2002

'Prudent Person Rule' Standard for the Investment of Pension Fund Assets, Russell Galer, OECD, November 2002

OECD Recommendation on Core Principles of Occupational Pension Regulation, 21 July 2004

Australia's Mandatory Retirement Saving Policy: A view from the New Millennium, No 0108, Hazel Bateman & John Piggott, The Social Protection Advisory Service, the World Bank, March 2001

Social Security Reform and Women's Pensions: Chile, Alexandra Cox Edwards, Policy Research Report on Gender and Development, Working Paper Series No. 17, The World Bank, Development Research Group / Poverty Reduction and Economic Management Network, February 2001

Administrative Charges for Funded Pensions: An International Comparison and Assessment, No. 0016, Edward Whitehouse, The Social Protection Advisory Service, The World Bank, June 2000

Supervising Mandatory Pension Fund: Issues and Challenges, No. 9817, Gustavo Demarco & Rafael Rofman with contribution from Edward Whitehouse, The Social Protection Advisory Service, The World Bank, December 1998

Toward a Reformed and Coordinated Pensions System in Europe: Rationale and Potential Structure, No. 0407, Robert Holzmann, The Social Protection Advisory Service, The World Bank, March 2004

OECD Public Pension Programmes in Crisis: An Evaluation of the Reform Option, No. 9921, Richard Disney, The Social Protection Advisory Service, The World Bank, August 1999

The World Bank Approach to Pension Reform, No. 9807, Robert Holzmann, The Social Protection Advisory Service, The World Bank, December 1999

International Patterns of Pension Provision, No. 0009, Robert Palacios & Montserrat Pallares-Miralles, The Social Protection Advisory Service, The World Bank, April 2000

“Rethinking Pension Reform: The Myths About Social Security Systems”, Peter R Orszag (Sebago Associates, Inc.) & Joseph E Stiglitz (The World Bank), Presented at the conference on “ New Ideas About Old Age Security”, The World Bank, September 14-15, 1999

Predictability of Individual Pensions, Lawrence H Thompson, Working Paper AWP 3.5, OECD 1998

Financing Retirement: Private Pensions Policy Challenges, Donald J Johnston, Secretary General, OECD, 10th Edition of the Conference de Montreal “Competing in a Fast Changing World: Strategies for Success”, Canada – 7-10 June 2004, OECD

Recent Developments in Funding and Benefit Security, Juan Yermo, OECD, November 2003

Labour Market and Pensions in International Context, Eskil Wadensjo, Symposium 2002 of Research Network on Pensions (FNA), December 5 and 6, 2002 Dresden

Commission on Global Aging, Global Aging, The Challenge of the New Millennium, December 1990

Social Security Programs and Retirement Around the World, Jonathan Gruber and David Wise

Three Pillars of Pensions? A Proposal to End Mandatory Contributions, Larry Willmore, June 2000, DESA Discussion Paper No 3, United Nations

Public versus Private Provision of Pensions, Larry Willmore, Guido Bertucci, DESA Discussion Paper No. 1, United Nations, Revised in June 1999

Pension Commission, Pensions: Challenges and Choices, The First Report of the Pensions Commission, 2004

Retirement, Pensions and the Adequacy of Saving: A Guide to the Debate, Briefing Note No. 29, The Institute for Fiscal Studies