

## OECD-SOCR metadata on income replacement programmes - Mexico

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## INTRODUCTION

This note includes a comprehensive list of the social programmes included in the SOCR database, accessible via OECD.Stat [<http://stats.oecd.org/Index.aspx?DataSetCode=SOCR>].

Based on information collected in five rounds of the SOCR questionnaire, the database distinguishes between priority and optional programmes. Priority programmes have the following characteristics:

- They are main income replacement benefits, meaning they are not supplements but are typically received in their own right, independently of other benefits; and
- Their volume is significant or highly variable:
  - programmes with a significant number of recipients or expenditure (regardless whether open to new recipients or not); or
  - programmes open to new recipients that are highly sensitive to economic or social conditions.

All other programmes are considered as optional. For instance, very small programmes that are being phased out, as are benefit “top-ups” of unemployment benefits or pensions.

**Priority programmes are made publicly available through OECD.Stat**, optional programmes are not published. Programmes are organised by social protection branch (e.g. ‘OLD AGE’) and sub-branch (e.g. ‘Pensions’) under the form of programme tables. The aim of them is to include essential information needed by users to identify the benefit and to know methodological details that may be relevant for a correct interpretation of recipients figures.

**Data sources of local administrations.** Web links to official administrative databases and reports are provided when the sources are publicly available. These web pages are subject to changes by local administrations, which implies that in the future some links may not work.

Other OECD sources of qualitative information on social benefits: [Country policy descriptions](#).

Other OECD sources of information on social protection: [Social Expenditure \(SOCX\)](#), [Tax-Benefit model \(TaxBEN\)](#), [Family database](#), [Pensions at a Glance](#).

## OLD AGE

### Pensions

5 programmes reported

Programme Name [English]	<b>Old age pension and old age retirement (IMSS)</b>
Programme Name [Original]	Pension de vejez y cesantia (IMSS)
Means-tested	Yes
Reporting unit for annual caseloads	Individual recipients, average or point-in-time <sup>1</sup>
Other remarks	
Source	IMSS-Instituto Mexicano de Seguro Social, <a href="#">statistical report</a>

Programme Name [English]	<b>Retirement wages (ISSFAM)</b>
Programme Name [Original]	Haber de retiro (ISSFAM)
Means-tested	Yes
Reporting unit for annual caseloads	Individual recipients, average or point-in-time
Other remarks	
Source	ISSFAM-Instituto de Seguridad Social para las Fuerzas Armadas Mexicanas, <a href="#">annual report</a>

Programme Name [English]	<b>Old age pension (ISSSTE)</b>
Programme Name [Original]	Pensión vejez (ISSSTE)
Means-tested	Yes
Reporting unit for annual caseloads	Individual recipients, average or point-in-time
Other remarks	Includes all pension modalities, except labour risks
Source	ISSSTE-Instituto de Seguridad y Servicios de los Trabajadores del Estado, <a href="#">statistical yearbook</a>

Programme Name [English]	<b>Old age pension (PEMEX)</b>
Programme Name [Original]	Pensión vejez (PEMEX)
Means-tested	Yes
Reporting unit for annual caseloads	Individual recipients, average or point-in-time
Other remarks	
Source	PEMEX- <a href="#">Petroleos Mexicanos</a>

<sup>1</sup> In Mexico, point-in-time figures correspond to the number of recipients on 31 December of each year.

Programme Name [English]	<b>70 and over (SEDESOL)</b>
Programme Name [Original]	70 y más (SEDESOL)
Means-tested	Yes
Reporting unit for annual caseloads	Individual recipients, average or point-in-time
Other remarks	Age eligibility extended from 70 to 65 years and program name changed to Programa Pensión para Adultos Mayores (PPAM) in 2013.
Source	CONEVAL-Consejo Nacional de Evaluacion de la Politica de Desarrollo Social, <a href="#">social policy evaluation</a>

### **Early (Anticipated) retirement**

1 programme reported

Programme Name [English]	<b>Early retirement pensions (ISSSTE)</b>
Programme Name [Original]	Retiro anticipado (ISSSTE)
Means-tested	Yes
Reporting unit for annual caseloads	Individual recipients, average or point-in-time
Other remarks	
Source	ISSSTE-Instituto de Seguridad y Servicios de los Trabajadores del Estado, <a href="#">statistical yearbook</a>

## SURVIVORS

### Survivor Pensions

5 programmes reported

Programme Name [English]	<b>Widow(er)s pension (IMSS)</b>
Programme Name [Original]	Pension de viudez (IMSS)
Means-tested	Yes
Reporting unit for annual caseloads	Individual recipients, average or point-in-time
Other remarks	
Source	IMSS-Instituto Mexicano de Seguro Social, <a href="#">statistical report</a>

Programme Name [English]	<b>Widow(er)s pension due to work injuries (IMSS)</b>
Programme Name [Original]	Pension de viudez por accidente de trabajo (IMSS)
Means-tested	Yes
Reporting unit for annual caseloads	Individual recipients, average or point-in-time
Other remarks	
Source	IMSS-Instituto Mexicano de Seguro Social, <a href="#">statistical report</a>

Programme Name [English]	<b>Decease pension (ISSSTE)</b>
Programme Name [Original]	Pensiones de sobrevivencia (ISSSTE) - todas
Means-tested	Yes
Reporting unit for annual caseloads	Individual recipients, average or point-in-time
Other remarks	
Source	ISSSTE-Instituto de Seguridad y Servicios de los Trabajadores del Estado, <a href="#">statistical yearbook</a>

Programme Name [English]	<b>Decease pension (PEMEX)</b>
Programme Name [Original]	Pensiones de sobrevivencia (PEMEX)
Means-tested	Yes
Reporting unit for annual caseloads	Individual recipients, average or point-in-time
Other remarks	
Source	PEMEX- <a href="#">Petroleos Mexicanos</a>

Programme Name [English]	<b>Decease pension (ISSSTE) due to work injury</b>
Programme Name [Original]	Pensiones de sobrevivencia (ISSSTE) - por accidente de trabajo
Means-tested	Yes
Reporting unit for annual caseloads	Individual recipients, average or point-in-time
Other remarks	
Source	ISSSTE-Instituto de Seguridad y Servicios de los Trabajadores del Estado, <a href="#">statistical yearbook</a>

## INCAPACITY

### Disability Pensions

1 programme reported

Programme Name [English]	<b>Disability pensions (ISSSTE)</b>
Programme Name [Original]	Pensión de invalidez (ISSSTE)
Means-tested	Yes
Reporting unit for annual caseloads	Individual recipients, average or point-in-time
Other remarks	Includes partial and total disability
Source	ISSSTE-Instituto de Seguridad y Servicios de los Trabajadores del Estado, <a href="#">statistical yearbook</a>

### Pensions (Occupational injury and Disease)

3 programmes reported

Programme Name [English]	<b>Disability occupational pension due to work injuries (permanent incapacity, IMSS)</b>
Programme Name [Original]	Pensión de invalidez ocupacional por incapacidad permanente (IMSS)
Means-tested	Yes
Reporting unit for annual caseloads	Individual recipients, average or point-in-time
Other remarks	
Source	IMSS-Instituto Mexicano de Seguro Social, <a href="#">statistical report</a>

Programme Name [English]	<b>Disability occupational pension due to work injuries (ISSSTE)</b>
Programme Name [Original]	Pensión de invalidez ocupacional por incapacidad permanente (ISSSTE)
Means-tested	Yes
Reporting unit for annual caseloads	Individual recipients, average or point-in-time
Other remarks	
Source	ISSSTE-Instituto de Seguridad y Servicios de los Trabajadores del Estado, <a href="#">statistical yearbook</a>

Programme Name [English]	<b>Assistance to the disabled (DIF)</b>
Programme Name [Original]	Atención a Personas con Discapacidad
Means-tested	Yes
Reporting unit for annual caseloads	
Other remarks	
Source	CONEVAL-Consejo Nacional de Evaluacion de la Politica de Desarrollo Social, <a href="#">social policy evaluation</a>

### **Paid Sick Leave**

1 programme reported

Programme Name [English]	<b>Subsidy for ordinary sickness and professional sickness and accident</b>
Programme Name [Original]	Subsidios por enfermedad ordinaria y accidentes y enfermedades profesionales
Means-tested	Yes
Reporting unit for annual caseloads	Total number of recipients over the year
Other remarks	
Source	IMSS-Instituto Mexicano de Seguro Social, <a href="#">statistical report</a>



## FAMILY

### Maternity and Parental Leave

2 programme reported

Programme Name [English]	<b>Maternity Leave (ISSFAM)</b>
Programme Name [Original]	Licencia post-natal (ISSFAM)
Means-tested	Yes
Reporting unit for annual caseloads	Unit information missing
Other remarks	
Source	

Programme Name [English]	<b>Maternity Leave (PEMEX)</b>
Programme Name [Original]	Licencia post-natal (PEMEX)
Means-tested	Yes
Reporting unit for annual caseloads	Unit information missing
Other remarks	
Source	

## OTHER SOCIAL

### Income Maintenance

1 programme reported

Programme Name [English]	<b>Human Development Program - PROSPERA (SEDESOL)</b>
Programme Name [Original]	Programa de Desarrollo Humano - PROSPERA (SEDESOL)
Means-tested	Yes
Reporting unit for annual caseloads	Recipient households, average or point-in-time
Other remarks	Program name changed in 2014 (previously Oportunidades)
Source	CONEVAL-Consejo Nacional de Evaluacion de la Politica de Desarrollo Social, <a href="#">social policy evaluation</a>

## IN-WORK

### In-Work Benefits

1 programme reported

Programme Name [English]	<b>National Employment Service (SNE) - Temporary work</b>
Programme Name [Original]	Servicio Nacional de Empleo - Programa de empleo temporal
Means-tested	Yes
Reporting unit for annual caseloads	
Other remarks	
Source	CONEVAL-Consejo Nacional de Evaluacion de la Politica de Desarrollo Social, <a href="#">social policy evaluation</a>