

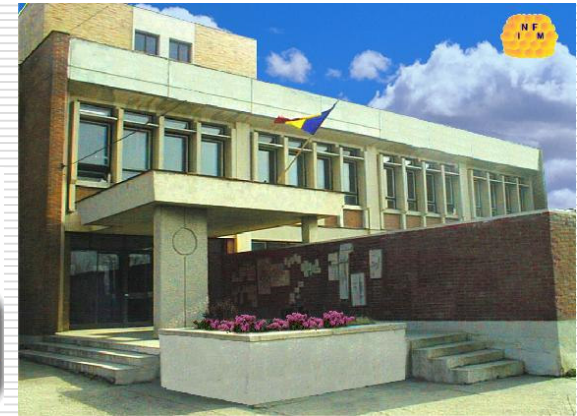
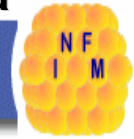
# "Penalized for Being Mobile?"

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# Why being mobile?

**Mobility allows us to move around and react to our environment in a timely manner!**

*Key words and aspects:*

*us and environment, move and react, timely*

- **A.** Physical, virtual mobility.
- **B.** Better, Faster and Cheaper! More general: Higher efficiency, visibility and impact. Translates into optimum management and problem solving, experience and 'positive' leadership.
- **C.** Easy access to unique things: equipment, places, information, other. Increased chances for access to financial and social support for independent, original thinking.
- **D.** Learning-teaching cycle
- **E.** Conditions: **among them pension system should be suitable (favorable!?) for the mobile 'us'!**
- **F.** Mobility is also linked with concepts such as balance, global economy, flexibility...
- **G.** The list is open!

# Pension system in Romania

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**1. State pension (classic):** based on the solidarity between generations. Young working generation pays the pension of the retired seniors. Based on law 19/2000. This system was also before 2000.

**2. Mandatory private pension:** mandatory for persons under 35 years old and optional for persons of 35-45 years old. The pension is a sort of forced saving, the pension being the amount of the contributions plus or minus the capitalization rate of the accumulated fund and minus handling fees. Based on Law 411/2004, applied from the end of 2007 for people under 35 years old and from the beginning of 2008 for the 35-45 years old category.

Currently contribution to pension is 9.5% (employee)+19.75% (employer) of the monthly salary (or income). The shift from pension 1 to pension 2 should be gradual till maximum 6% (of the 9.5%) and till 2016.

**3. Private pension:** (Law 204/2006, applied from the end of 2007) similar to pension 2, except that the amount of contribution to the pension fund is chosen by each person and it is maximum 15% of the salary, should be minimum 90 monthly contributions and can be used only after 60 years old.

# My experience

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## International Fellowships/Projects/Awards:

**A: no pension scheme!!!!**

### **-PhD fellowship of the 'Romania-Ukraine Partnership Program' (1993-1996)**

**-no full time PhD in Romania at that time, only part time PhD, i.e. one works (and automatically pay contribution for pension) and in the free time makes research for PhD. New law indicates that pension should be calculated as if during 5 year university education one pays a certain contribution. How about PhD of full time type which at that time was not officially available?**

### **-JSPS/STA Japan (2000-2002)**

**-home institute pays salary for the first 3 month of a long stay and after that the status is 'suspended' and there is no social contribution. At that time private *pension 3* was not available and only recently the system allows to pay the contribution to *pension 1* (and unclear if also for *pension 2*!) based on a contract directly between researcher and state (*pension 1*).  
I was told I cannot pay now for 2000-2002 (*pension 1*)!**

# My experience

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## International Fellowships/Projects/Awards:

**A: no pension scheme!!!!**

**-Alexander von Humboldt, Germany**

**(2008 (2007)-2010)**

**-rule of 3 month of my home institute is applicable. Now I can make a direct contract for *pension 1*. How about the shift from *pension 1* to *pension 2* (from the beginning of 2008) and the possibility to make a direct contract for *pension 2* (or 1+2) which looks attractive and I am eligible (i.e. less than 45 years old)?**

**In the summer of 2007 the information was that without an income/salary in Romania I cannot shift from pension 1 to pension 2. It means that I shall apply for *pension 2* in 2010 when I shall return to my home institute. Considering that the profit curve for *pension 2* (or *pension 3*) is a long term one, applying later it means that I am in disadvantage.**

**What if I exceed the 45 years old limit?**

**Good news is that I can apply from the end of 2007 for private *pension 3*!**

# My experience

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## International Fellowships/Projects/Awards:

**B: with pension scheme!!!!**

- NIMS fellow – Special researcher (2002-2003), Japan**
- Associate Researcher (Assistant Professor, visiting) (2003-2005), IMR, Tohoku University, Japan**
- NEDO fellow (2005-2007), Japan**

**Integrated in the National Japanese Pension System! To have a pension from Japan it is necessary to work there 25years. There is no transfer system of the pension between Japan and Romania!!!! One can ask just for a lump sum payment which is some percent of the contribution.**

**There is a transfer system based on bilateral agreements between Japan and few countries from EU (e.g. Japan-Germany) starting from 2007!**

# Conclusion

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## **1. There are problems with pension vs. mobility:**

- **The pension system is not uniform and transfer/compatibility mechanisms are local or does not exist!**
- **The system of financial support for mobile science is not always designed to meet the needs of the researcher: e.g. some of the most competitive and prestigious International fellowships/projects/positions such as JSPS, Japan or Alexander von Humboldt, Germany does not consider and offer any choice to access the pension system.**

*In the pension system the key point seems to be who pays the contribution rather than the needs of the researcher. Is only the researcher interested to have a pension?*

- **Access to information, advice about pension is difficult, takes much time and energy and in many cases it may lead to no result since the law is not covering special cases.**

## **2. Talking only about mobility vs. pension cannot make a positive impact of the mobility. Are we really prepared for a mobile researchers (workers)?**

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**Thank you very much for your attention!**