



Export of unemployment benefits

PD U2 Questionnaire – reference year 2015

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PD U2 Questionnaire – reference year 2015

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Table of Contents

List of Tables	6
List of Figures	7
Summary of the main findings.....	8
1. Introduction	9
2. Administrative procedure.....	10
3. Number of PDs U2 issued and received	11
3.1. The current flow of PDs U2 among Member States	11
3.2. As a share of the total number of unemployed persons	13
3.3. Explaining the reasons for exporting the unemployment benefit	15
3.4. Evolution of the number of PDs U2 issued and received	16
3. The number of prolongations	16
4. The success rate and impact of prolongation	19
5. Return to the competent Member State	22
6. Practical implementation of the rules.....	23
7. Awareness-raising policies	24
Annex I PD U2 Questionnaire	25
Annex II Portable Document U2.....	27

LIST OF TABLES

Table 1	The number of PDs U2/SEDs U008 issued and received, 2015	12
Table 2	The percentage of unemployed persons with a PD U2/SED U008 compared to the average number of unemployed persons, 2015	14
Table 3	Evolution of the number of PDs U2 issued and received, 2014-2015	16
Table 4	An update of the policies applied by the MSs concerning the request for prolongation of the period of export (prolongation possible? Yes / No)	18
Table 5	The number of requested and granted prolongations of the period of export, 2015	19
Table 6	The number of unemployed persons with a PD U2 who found work, by sending MS, 2015	21
Table 7	The number of unemployed persons with a PD U2 who found work, by receiving MS, 2015	22
Table 8	The number of persons who returned and registered with the employment services in the competent MS before the end of the export period, by sending MS, 2015	23

LIST OF FIGURES

Figure 1	The current and future flow of documents applicable to the export of unemployment benefits	10
Figure 2	Net balance between unemployed jobseekers sent on the basis of a PD U2/SED U008 and unemployed jobseekers received on the basis of a PD U2/SED U008, 2015	13
Figure 3	The percentage of unemployed persons who exported their unemployment benefit confronted with the average unemployment rate of 2015, by issuing MS	15

SUMMARY OF THE MAIN FINDINGS

- An unemployed person who wants to look for employment in a different Member State than the one that pays the unemployment benefit may export this benefit for a limited period of time. Portable Document U2 grants the person concerned an authorisation to export the unemployment benefit to another Member State to seek work there for a period of three months. The competent Member State may, however, extend this period up to a maximum of six months.
- Figures reported by 29 Member States¹ show a total of 27,514 authorisations issued in 2015. Most were issued by the Netherlands (5,049), Germany (4,637) and Spain (3,159). Furthermore, Poland (7,346) and the United Kingdom (3,022) registered the highest number of jobseekers on the basis of a PD U2.
- The mobility of jobseekers looking for work abroad on the basis of a PD U2 is rather limited observing that a PD U2 was issued for approximately 1 in 1,000 unemployed persons. This might partly be the result of a lack of awareness and knowledge about the EU provisions on the export of unemployment benefits. Only Iceland, Luxembourg and Norway show a relatively high mobility of jobseekers with a PD U2 (more than 1 in 100 insured persons). Nonetheless, the overall number of PDs U2 issued increased by some 5% compared to last year.
- Several factors may influence the decision to export the unemployment benefit. Figures show a negative relationship between the share of unemployed persons exporting their benefit and the national unemployment rate, which is in contradiction to what one might assume. Reasons to export the unemployment benefit other than the height of the unemployment rate are thus probably more decisive.
- The export rules are not applied uniformly across the EU. It appears that almost half of the Member States do not provide an extension:
 - *3 months, no extension:* Cyprus, Denmark, Finland, France, Croatia, Greece, Sweden, Hungary, Italy, Ireland, the Netherlands, the United Kingdom, Iceland and Norway;
 - *3 months, possibility to extend:* Austria, Belgium, Bulgaria, Spain, Germany, Luxembourg, Romania, Estonia, Latvia, Lithuania, Slovenia, Slovakia, Poland and Portugal;
 - *6 months by default:* the Czech Republic and Malta.
- Approximately 9% of the authorisations were prolonged. Furthermore, it should be noted that already 8% of the PDs U2 were issued immediately for a period of more than three months.
- Roughly 1 in 10 of the unemployed persons with a PD U2 found work abroad. The low success rates for the Netherlands as the main sending Member State and Poland as the main receiving Member State suggest that the main objective of the export of unemployment benefits, namely to find employment abroad, is still insufficiently accomplished. Furthermore, the prolongation of the export period results in a higher percentage of unemployed persons finding employment abroad.
- Only 13% of the persons return to the competent Member State before the period during which the unemployment benefit is retained expires. These figures suggest that a high number of unemployed persons stay abroad even if they are no longer entitled to an unemployment benefit from the competent Member State.

¹ No figures were provided by France, Greece and Liechtenstein.

1. INTRODUCTION

Unemployed persons who want to look for employment in a different Member State (MS)² than the one that pays the unemployment benefit may export this benefit for a limited period of time under Article 64 of Regulation (EC) No 883/2004^{3,4}. However, the unemployed person has to fulfil some conditions to receive the unemployment benefit in another MS. The person concerned must have been registered as a person seeking work and have remained available to the employment services of the competent MS for at least four weeks after becoming unemployed. However, the competent institutions may authorise departure before such time has expired.⁵ Furthermore, the unemployed person must register as a person seeking work with the employment services of the MS to which (s)he has gone and must be subject to the control procedure of that MS and adhere to the conditions laid down by the legislation of that MS. This condition is satisfied if the person concerned registers within seven days from the date on which (s)he was no longer available to the employment services of the competent MS.

Entitlement to an unemployment benefit is retained for a period of three months from the date when the unemployed person ceased to be available to the employment services of the competent MS. Of course, this period of three months only applies if it does not exceed the period of entitlement provided for under the legislation of the competent MS. The competent institutions may, however, extend this period of three months up to a maximum of six months. The person concerned must return to the competent MS before the period during which the unemployment benefit is retained expires. The person concerned will lose all entitlement to benefits of the competent MS if (s)he does not return in time, unless the provisions of the competent MS are more favourable.

Portable Document U2 (PD U2)⁶ '*Retention of unemployment benefits*' authorises unemployed persons to export their unemployment benefits if they go to another MS to look for work.⁷ It allows unemployed persons to seek work in another MS without becoming a financial burden on the social security system of that MS.

This report provides statistics on the use of PD U2/SED U008⁸ and relates to reference year 2015.⁹ The data collection exercise was accompanied by several additional

² 28 EU Member States and EFTA. EU-28 Member States: Belgium (BE), Greece (EL), Luxembourg (LU), Denmark (DK), Spain (ES), Netherlands (NL), Germany (DE), France (FR), Portugal (PT), Ireland (IE), Italy (IT), United Kingdom (UK), Austria (AT), Finland (FI), Sweden (SE), Croatia (HR), Romania (RO), Bulgaria (BG), Poland (PL), Czech Republic (CZ), Latvia (LV), Lithuania (LT), Slovenia (SI), Estonia (EE), Slovakia (SK), Hungary (HU), Cyprus (CY) and Malta (MT). EFTA countries: Iceland (IS), Liechtenstein (LT), Norway (NO) and Switzerland (CH).

³ Regulation (EC) No 883/2004 of the European Parliament and of the Council of 29 April 2004 on the coordination of social security systems.

⁴ Please note that under Article 65 (2) of Regulation (EC) No 883/2004 a frontier worker has the possibility of making him or herself available to the unemployment services of the MS in which (s)he pursued his or her last activity as an employed or self-employed person. This person can of course also go, under the conditions of Article 64, to another MS to seek work.

⁵ For instance, Recommendation No U2 of the Administrative Commission from 12 June 2009 affirms authorisation before expiry of the four-week period if the person concerned fulfils all other conditions and is accompanying his or her spouse or partner who has taken up employment in a MS other than the competent MS.

⁶ See Annex II.

⁷ See also Article 55 of implementing Regulation (EC) No 987/2009 of the European Parliament and of the Council of 16 September 2009 laying down the procedure for implementing Regulation (EC) No 883/2004 on the coordination of social security systems.

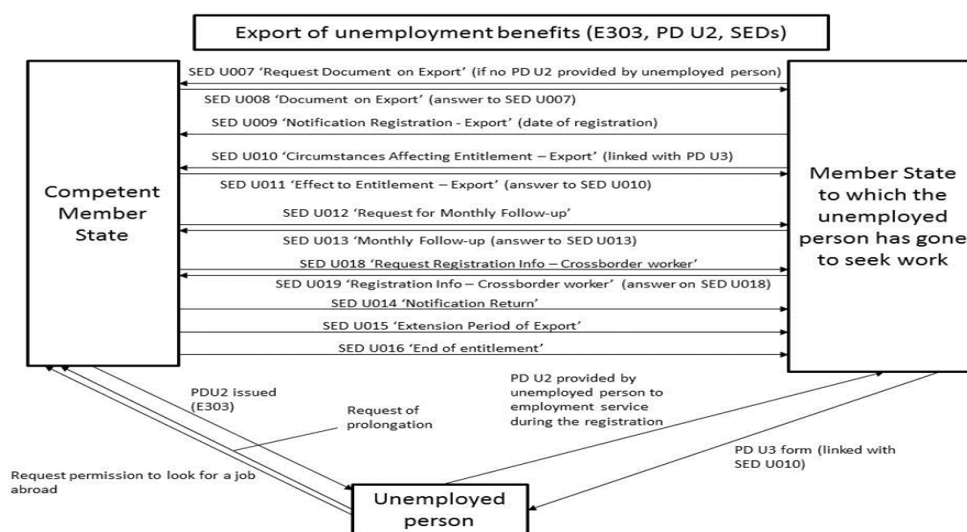
⁸ The competent MS will provide an SED U008 if the unemployed person has been registered as a jobseeker without a PD U2.

qualitative questions giving MSs the opportunity to share their experiences with the application of the EU provisions to the export of unemployment benefits.

2. ADMINISTRATIVE PROCEDURE

To facilitate the understanding of frequently used terms, *Figure 1* provides an overview of the current flow of documents between the citizen and the MSs involved. This also enables us to identify some of these flows and to discuss the related administrative concerns later on.

Figure 1 The current and future flow of documents applicable to the export of unemployment benefits



Source The authors' own figure based on SEDs

PD U2 (E303 form) grants the unemployed person an authorisation to export his or her unemployment benefit to another MS in order to seek work there. With this PD U2, the unemployed person must register as a person seeking work with the employment services of the MS to which (s)he has gone. The institution in this MS has to inform the competent institution about the registration by means of a Structured Electronic Document (SED)¹⁰ U009 '*Notification Registration - Export*'. When the unemployed person registers without a PD U2, the institution in the MS to which the unemployed person has gone requests the document on export from the competent institution by means of an SED U007 '*Request Document on Export*' and indicates the date of registration. The competent institution provides the institution in the MS to which the unemployed person has gone with the requested document (SED U008, '*Document on Export*')¹¹ and continues to pay the unemployment benefit of the unemployed person. The latter may request an extension of the export period for another three months up to a maximum of six months. If the competent institution extends the export period it has to inform the institution in the MS to which the unemployed person has gone about the extension by means of an SED U015 '*Extension Period of Export*'.

⁹ See Annex I for the PD U2 Questionnaire.

¹⁰ All communication between national institutions on cross-border social security takes place by using structured electronic documents.

¹¹ However, only the body of the SED U008 provides information on the entitlement.

The competent institution may request a monthly follow-up from the institution in the MS to which the unemployed person has gone (by means of a PD U2 (point 3.2 of the document) or an SED U012 '*Request for Monthly Follow-up*'). If a monthly follow-up is requested, each month the institution in the MS to which the unemployed person has gone has to confirm by means of an SED U013 '*Monthly Follow-up*' that the unemployed person still complies with the procedures. If any circumstances occur which could affect the entitlement to an unemployment benefit (the person has taken up employment, has become self-employed, has refused a job offer or interview request etc) the institution in the MS to which the unemployed person has gone has to inform the competent institution by means of an SED U010 '*Circumstances Affecting Entitlement – Export*' and the unemployed person by means of a PD U3 '*Circumstances likely to affect the entitlement to unemployment benefits*'.

3. NUMBER OF PDS U2 ISSUED AND RECEIVED

3.1. The current flow of PDs U2 among Member States

Input from 29 MSs¹² was received, resulting in the calculation of a total of 27,514 PDs U2/SEDs U008 issued and 21,648 of PDs U2/SEDs U008 received in 2015 (*Table 1*).

Most PDs U2/SEDs U008 were issued (*in absolute terms*) by the Netherlands (5,049), Germany (4,637), Spain (3,159) and Switzerland (2,041) (*Table 1*). In addition, the Netherlands received 421 requests for a PD U2 which were not issued. This is in contrast to Malta (0) and Romania (24) which issued no or hardly any PDs U2/SEDs U008. Poland (7,346) and the United Kingdom (3,022) clearly registered the highest number of jobseekers on the basis of a PD U2/SED U008 (*in absolute terms*). The export of unemployment benefits expressed in relative terms, namely as a share in the total number of unemployed persons, is probably a better indicator to describe the impact of the EU provisions with regard to the export of unemployment benefits. This has been calculated in *section 3.2* of this report.

Some 2,304 forms or 8% of the total number of forms were issued immediately for a period longer than three months. This policy was applied by six MSs, namely the Czech Republic, Germany, Luxembourg, Poland, Slovenia and Slovakia. Especially the Czech Republic (88%) issued a high number of PDs U2/SEDs U008 immediately for a period longer than three months.

No distinction could be made between the number of PDs U2 issued/received and the number of SEDs U008 issued/received. This distinction would enable us to quantify the number of unemployed persons who registered with the employment service in the MS to which they went with(out) a PD U2. For instance, Italy reported that they issued 448 PDs U2 (94% of total) and 29 SEDs U008 (6% of total).

More detailed information about the bilateral flows of incoming and outgoing jobseekers was not requested by the PD U2 Questionnaire. This kind of information will be included in next year's questionnaire and reporting. Nonetheless, some Member States did already provide such information. The Netherlands, which issued the highest number of PDs U2 in 2015, reports that they noticed an increased number of requests for export to Poland. Also, some 45% of the unemployed persons who received a PD U2 from Belgium moved to France, some 15% moved to Spain, some 7% moved to Germany and some 6% moved to the Netherlands. Finally, Croatia

¹² No figures were provided by France, Greece and Liechtenstein.

reports that in the majority of cases exports are being made to Germany, Sweden and Ireland.

Currently, only figures on the total number of forms issued and received are collected. Nonetheless, an unemployed person might export the unemployment more than one time during the reference period or during the benefit period. For instance, Belgium reports that 1,535 unemployed persons exported their unemployment benefit in 2015, but this group at the same time exported 1,558 times their benefit.¹³ Denmark reports that for the two-year period 2013-2014, 14 people exported unemployment benefits twice to another MS within the benefit period. None of these persons exported unemployment benefits to another MS more than twice within the same benefit period, and none exported several times within the same year.

Table 1 The number of PDs U2/SEDs U008 issued and received, 2015

	Issued			Received	
	No of PDs U2 or SEDs U008 issued for up to 3 months (A)	No of PDs U2 or SEDs U008 issued for more than 3 months (B)	Total No of PDs U2 or SEDs U008 issued (A+B)	Share more than 3 months in total No of PDs U2 or SEDs U008 issued (B/(A+B))	No of persons who registered as a jobseeker on the basis of a PD U2 or on the basis of an SED U008
BE	1,535	0	1,535	0%	624
BG	70	0	70	0%	129
CZ	34	242	276	88%	223
DK	1,569	0	1,569	0%	230
DE	2,671	1,966***	4,637	42%	1,351
EE	57	0	57	0%	60
IE	918	0	918	0%	268
EL	n.a.	n.a.	n.a.	n.a.	n.a.
ES	3,159	0	3,159	0%	1,858
FR	n.a.	n.a.	n.a.	n.a.	n.a.
HR	68	0	68	0%	54
IT*	477	0	477	0%	19
CY	102	0	102	0%	56
LV	293	0	293	0%	201
LT	128	0	128	0%	360
LU	166	59	225	26%	148
HU	76	0	76	0%	212
MT	0	0	0		108
NL**	5,049	0	5,049	0%	457
AT	2,013	n.a.	2,013	0%	823
PL	243	19	262	7%	7,346
PT	1,744	0	1,744	0%	677
RO	24	0	24	0%	553
SI	46	14	60	23%	27
SK	83	4	87	5%	616
FI	97	0	97	0%	95
SE	229	0	229	0%	647
UK	225	0	225	0%	3,022
IS	549	n.a.	549	0%	84
LI	n.a.	n.a.	n.a.	n.a.	n.a.
NO	1,544	0	1,544	0%	396
CH	2,041		2,041	0%	1,004
Total	25,210	2,304	27,514	8%	21,648

* IT: of which 448 PDs U2 and 29 SEDs U008

** NL: Besides the 5,049 PDs U2 issued, there were also 421 requests for a PD U2 which were not issued. This makes a total of 5,470 requests.

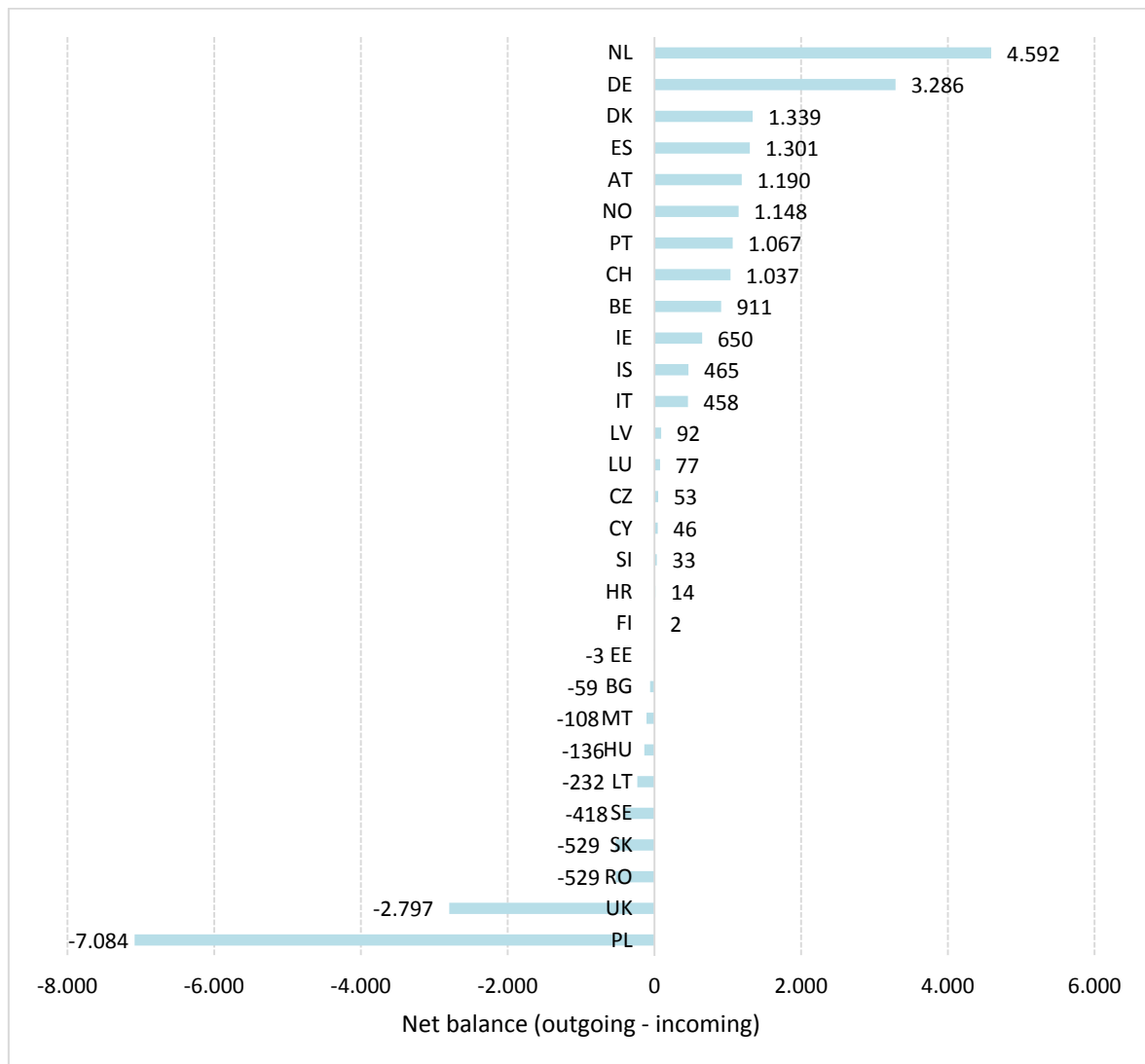
*** DE: including cases in which the export period was extended.

Source Administrative data PD U2 Questionnaire 2016

¹³ Please note that Belgium has reported the number of persons involved. This figure is reported in *Table 1*.

Figure 1 gives an overview of the net balance of PDs U2/SEDs U008 per MS by showing the number of outgoing jobseekers on the basis of a PD U2/SED U008 minus the number of incoming jobseekers on the basis of a PD U2/SED U008. Some MSs¹⁴ are 'net recipients', implying that more jobseekers are received than sent. However, most MSs¹⁵ are 'net senders'.

Figure 2 Net balance between unemployed jobseekers sent on the basis of a PD U2/SED U008 and unemployed jobseekers received on the basis of a PD U2/SED U008, 2015



* No data available for EL, FR and LI.

Source Administrative data PD U2 Questionnaire 2016

3.2. As a share of the total number of unemployed persons

The mobility of unemployed persons seems limited when confronting the data on the export of unemployment benefits with the average number of unemployed persons (Table 2). On average 0.14% (1 in 1,000) of unemployed persons moved abroad on the basis of a PD U2/SED U008 in order to seek work there. Only Iceland (6.9%), Norway (1.28%) and Luxembourg (1.25%) show a percentage of more than 1% of

¹⁴ PL, UK, RO, SK, SE, LT, HU, MT, BG and EE.

¹⁵ NL, DE, DK, ES, AT, NO, PT, CH, BE, IE, IS, IT, LV, LU, CZ, CY, SI, HR and FI.

unemployed persons exporting their unemployment benefit. The Netherlands, which has issued the highest number of PDs U2 in 2015, shows an 'export rate' of 0.8%.

The export of unemployment benefits leads to a shift of the number of persons looking for employment from the competent MS towards the MS to which the unemployed person has gone. The export of unemployment benefits nonetheless has a limited impact on the receiving Member States. For instance, 0.6% and 0.2% of the unemployed persons of Poland and the UK, respectively, which are the two main receiving MSs in absolute terms, are unemployed persons with the authorisation to import their unemployment benefit.

The estimated impact might be an underestimation as the number of unemployed persons and not the number of persons receiving an unemployed benefit has been used as denominator for the calculation of this indicator. No data on the number of persons receiving an unemployment benefit are, however, available at EU-level.

Table 2 The percentage of unemployed persons with a PD U2/SED U008 compared to the average number of unemployed persons, 2015

	Average number of unemployed persons (in ,000) (A)	Total No of PDs U2 or SEDs U008 issued (B)	% unemployed persons who have exported their unemployment benefit (B/A)	Total No of PDs U2 or SEDs U008 received (C)	Share of PDs U2 or SEDs U008 received in total number of unemployed persons (C/(C+A))
BE	422	1,535	0.36%	624	0.15%
BG	305	70	0.02%	129	0.04%
CZ	268	276	0.10%	223	0.08%
DK	181	1,569	0.87%	230	0.13%
DE	1,950	4,637	0.24%	1,351	0.07%
EE	42	57	0.14%	60	0.14%
IE	204	918	0.45%	268	0.13%
EL	1,197	n.a.	0.00%	n.a.	0.00%
ES	5,056	3,159	0.06%	1,858	0.04%
FR	3,047	n.a.	0.00%	n.a.	0.00%
HR	309	68	0.02%	54	0.02%
IT	3,032	477	0.02%	19	0.00%
CY	63	102	0.16%	56	0.09%
LV	98	293	0.30%	201	0.20%
LT	134	128	0.10%	360	0.27%
LU	18	225	1.25%	148	0.82%
HU	308	76	0.02%	212	0.07%
MT	11	0	0.00%	108	0.97%
NL	614	5,049	0.82%	457	0.07%
AT	252	2,013	0.80%	823	0.33%
PL	1,304	262	0.02%	7,346	0.56%
PT	648	1,744	0.27%	677	0.10%
RO	624	24	0.00%	553	0.09%
SI	90	60	0.07%	27	0.03%
SK	314	87	0.03%	616	0.20%
FI	252	97	0.04%	95	0.04%
SE	387	229	0.06%	647	0.17%
UK	1,741	225	0.01%	3,022	0.17%
IS	8	549	6.86%	84	1.04%
LI	n.a.	n.a.	n.a.	n.a.	n.a.
NO	121	1,544	1.28%	396	0.33%
CH	219	2,041	0.93%	1,004	0.46%
Total*	18,975	27,514	0.14%	21,648	0.11%

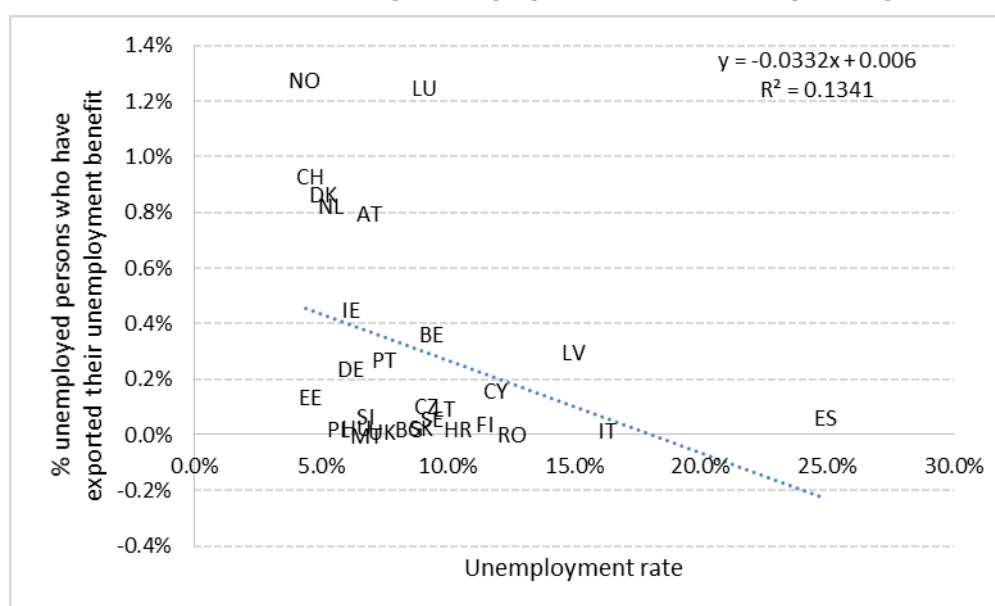
* EL, FR and LI excluded.

Source Administrative data PD U2 Questionnaire 2016; Eurostat [une_nb_a]

3.3. Explaining the reasons for exporting the unemployment benefit

Several factors could influence the decision to export the unemployment benefit. For instance, the incoming and outgoing flows of jobseekers could be explained by the level of the national unemployment rates. A higher export rate of unemployment benefits in MSs with a high unemployment rate as well as the export of unemployment benefits to MSs with a lower unemployment rate compared to the competent MS could be expected.¹⁶ Figure 3 compares the export of unemployment benefits in relative terms (as a share of the number of unemployed persons in the outgoing MS) with the national unemployment rates. The figure shows a negative relationship between both variables, which is in contradiction to the original hypothesis. Moreover, on the basis of data provided by Belgium we already observed that unemployed persons who received a PD U2 from Belgium mainly moved to France and Spain. Both MSs have, however, a higher unemployment rate than Belgium. Reasons to export the unemployment benefit other than the height of the unemployment rate are thus perhaps more decisive.

Figure 3 The percentage of unemployed persons who exported their unemployment benefit confronted with the average unemployment rate of 2015, by issuing MS



* No data available for EL, FR and LI.

** R2 measures how close the data are to the trend line. In general, the closer the R2 is to 1, the better the model fits the data.

*** There is a negative correlation coefficient of -0.4.

Source Administrative data PD U2 Questionnaire 2016; Eurostat [une_nb_a]

Other reasons such as familiarity with the MS where a person is looking for employment or the mobile worker's 'return' to his or her country of birth may play an important role. The PD U2 Questionnaire asked MSs if they carried out an assessment, survey or study at national level on the export of unemployment benefits. This information could be helpful to identify reasons for exporting the unemployment benefit, but also to describe the profile of the jobseekers going abroad. However, no Member States carried out such an assessment in 2015. Sweden reported already in the report for reference year 2014 that "jobseekers between the ages of 30 and 39

¹⁶ Figures on the bilateral flows between MSs were, however, not collected by the PD U2 Questionnaire.

used the opportunity to export their unemployment benefits [to] a slightly higher extent than other age categories and that 48 percent of the jobseekers who travelled to another EU country to search for work went to their own birth country". Furthermore, figures provided by Belgium show that 64% of the unemployed persons who received a PD U2 from Belgium in 2015 have Belgian nationality.

3.4. Evolution of the number of PDs U2 issued and received

By comparing the figures reported for 2014 and 2015, the evolution of the number of PDs U2/SEDs U008 could be reported. The overall number of PDs U2 issued increased by some 5% compared to last year and the number of PDs U2 received even increased by almost 10% (Table 3). Especially Switzerland (+71%) and the Netherlands (+63%) issued much more authorisations compared to last year. This is in contrast to Finland (-69%), Italy (-66%) and Hungary (-60%), which issued far less forms. Moreover, Poland, which was already the main receiving Member State in 2014, received some 58% more PDs U2 or SEDs U008 in 2015 compared to 2014.

Table 3 Evolution of the number of PDs U2 issued and received, 2014-2015

	Total number of PDs U2 or SEDs U008 issued			Total number of PDs U2 or SEDs U008 received		
	2015	2014	% change	2015	2014	% change
BE	1,535	1,517	1.2%	624	908	-31.3%
BG	70	50	40.0%	129	214	-39.7%
CZ	276	236	16.9%	223	212	5.2%
DK	1,569	1,403	11.8%	230	190	21.1%
DE	4,637	4,080	13.7%	1,351	1,458	-7.3%
EE	57	70	-18.6%	60	64	-6.3%
IE	918	731	25.6%	268	444	-39.6%
EL						
ES	3,159	4,096	-22.9%	1,858	1,616	15.0%
FR						
HR	68	62	9.7%	54	45	20.0%
IT	477	1,421	-66.4%	19		
CY	102			56		
LV	293	277	5.8%	201	230	-12.6%
LT	128	97	32.0%	360	298	20.8%
LU	225	198	13.6%	148	158	-6.3%
HU	76	191	-60.2%	212	277	-23.5%
MT	0	3	-100.0%	108	115	-6.1%
NL	5,049	3,099	62.9%	457	519	-11.9%
AT	2,013			823		
PL	262	309	-15.2%	7,346	4,651	57.9%
PT	1,744	2,409	-27.6%	677	582	16.3%
RO	24	25	-4.0%	553	381	45.1%
SI	60	106	-43.4%	27	23	17.4%
SK	87	89	-2.2%	616	494	24.7%
FI	97	316	-69.3%	95	98	-3.1%
SE	229	264	-13.3%	647	644	0.5%
UK	225	273	-17.6%	3,022	3,594	-15.9%
IS	549	495	10.9%	84	102	-17.6%
LI		0			0	
NO	1,544	1,084	42.4%	396	434	-8.8%
CH	2,041	1,192	71.2%	1,004	1,156	-13.1%
Total*	25,399	24,093	5.4%	20,750	18,907	9.7%

* Only selecting those countries which reported figures for 2014 and 2015

Source Administrative data PD U2 Questionnaire 2015 and 2016

3. THE NUMBER OF PROLONGATIONS

When unemployment benefits are exported, the entitlement to an unemployment benefit is retained for a period of three months. The competent institutions may, however, extend this period of three months up to a maximum of six months.

This freedom of choice which MSs are given by Article 64(1)(c) of Regulation (EC) No 883/2004 to extend the period of three months up to a maximum of six months results in a non-uniform application of the export rules.

Based on the quantitative and qualitative input of the MSs, differences appear in the policies applied for granting a prolongation (*Table 4* and *Table 5*). It appears that almost half of the MSs do not provide an extension.

- *3 months, no extension:* Cyprus, Denmark, Finland, France, Croatia, Greece, Sweden, Hungary, Italy, Ireland, the Netherlands, the United Kingdom, Iceland, Norway and Switzerland;
- *3 months, possibility to extend:* Austria, Belgium, Bulgaria, Spain, Germany, Luxembourg, Romania, Estonia, Latvia, Lithuania, Slovenia, Slovakia, Poland, Portugal;
- *6 months by default:* Czech Republic and Malta.

Most MSs which may provide an extension have defined formal criteria to assess the requests for prolongation. The criteria most applied are:

- i) proof of an increased chance of finding employment abroad during the extended period (e.g. BE, BG, RO and ES);
- ii) proof of efforts by the unemployed person during the first three months (e.g. BE, EE, LT, PT and AT);
- iii) job opportunities on the labour market of the competent MS (e.g. DE, PL and AT).

Table 4 An update of the policies applied by the MSs concerning the request for prolongation of the period of export (prolongation possible? Yes / No)

MS	Prolongation	Applied criteria
BE	YES	* Efforts of the unemployed person to look for work * Chance of finding employment abroad
BG	YES	* Is there an increased possibility to find employment abroad?
CZ	Most unemployed persons are authorised to export their unemployment benefit for the complete entitlement period. Only in some cases a PD U2 is issued for 3 months with a possibility of prolongation.	
DK	NO	
DE	YES	* The unemployed person's reason to seek work abroad * Chance of integration * Taking into account the national labour demand
EE	YES	Taking into account: * the unemployed person's efforts to look for work abroad during the first 3 months; * the unemployed person's planned activities for the future job-seeking process; * the jobseeker's evaluation why and how the prolongation would help to find employment abroad; * the opinion of the mediation consultant.
IE	NO	A limited period of prolongation can be allowed in exceptional circumstances.
EL	NO	
ES	YES	* Proof that the prolongation period has anything to do with actual possibilities to find employment
FR	NO	
HR	NO	
IT	NO	
CY	NO	
LV	YES	* Compliance with all procedures
LT	YES	* Person should write an application and present evidence of his/her job search in the MS
LU	YES	However, if a person leaves the country without any intention of returning, the prolongation is not granted.
HU	Because of the maximum length of the unemployment benefit (90 days) prolongation of the export is not possible. On the other hand, prolongation of the export in the event of an unemployment benefit prior to pension is possible.	
MT	If on the basis of the length of his/her insurance record a person is entitled to a benefit for 6 months, the prolongation is granted automatically.	
NL	NO	
AT	YES	The jobseeker has to return to Austria. Only in exceptional cases a request of prolongation is approved without return. Taking into account: * the job search during the first 3 months; * whether there is a need for additional education/ training; * job availability on the national labour market.
PL	YES	* The competent institution will verify whether or not there is a job offer or any other labour market instrument addressed to the unemployed person in Poland.
PT	YES	* Verification of active job search by information request through applicable SED
RO	YES	* Approved on the ground that a longer export period is likely to provide a greater chance of finding employment, and inasmuch as the unemployed person complies with the control and checking rules applied by the assisting institution.
SI	YES	* The assessment of the request for prolongation of the period of export is usually based on the information provided by the person's employment counsellor in another MS.
SK	YES	* It is sufficient to prove any reason for such a request, e.g. family reasons, better possibilities to find employment or a study interest.
FI	NO	
SE	NO	
UK	NO	
IS	NO	
NO	NO	
LI		
CH	NO	

Source PD U2 Questionnaires 2014 and 2015

Approximately 9% of the PDs U2 were prolonged (*Table 5*). This percentage would even be higher when deducting the number of jobseekers who found employment during the first three months (see also *Table 6*) from the number of PDs U2/SEDs U008 issued for up to three months. This kind of data is only available for a limited number of MSs. Furthermore, it should be noted that 8% of the PDs U2/SEDs U008 were already issued for more than three months (see *Table 1*).

Six MSs, namely Latvia (33%), Spain (30%), Romania (29%), Lithuania (24%), Slovenia (23%) and Estonia (23%), prolonged more than a fifth of the PDs U2/SEDs U008.

Almost all requests for a prolongation of the export were approved by the reporting MSs which may grant a prolongation. This suggests that these MSs are rather flexible on the application of prolongation.

Table 5 The number of requested and granted prolongations of the period of export, 2015

MS	Total number of PDs U2 or SEDs U008 issued (A)	No of requests for prolongation of export (B)	No of prolongations granted (C)	% prolonged (C/A)	% prolonged by using a more selective definition*	% approved (C/B)
BE	1,535	n.a.	69	4.5%		
BG	70	3	3	4.3%		100.0%
CZ	276	35	35	12.7%	15.3%	100.0%
DK	1,569	0	0	0.0%	0.0%	
DE	4,637	n.a.	n.a.			
EE	57	13	13	22.8%	27.7%	100.0%
IE	918	13	0	0.0%		0.0%
EL	n.a.	n.a.	n.a.			
ES	3,159	1,014	957	30.3%	41.0%	94.4%
FR	n.a.	n.a.	n.a.			
HR	68	0	0	0.0%	0.0%	
IT	477	0	0	0.0%		
CY	102	1	n.a.	0.0%	0.0%	0.0%
LV	293	132	97	33.1%	55.7%	73.5%
LT	128	n.a.	31	24.2%	28.2%	
LU	225	n.a.	n.a.	0.0%	0.0%	
HU	76	0	0	0.0%	0.0%	
MT	0	n.a.	n.a.			
NL	5,049	6	0	0.0%	0.0%	0.0%
AT	2,013	n.a.	n.a.	0.0%		
PL	262	35	31	11.8%	12.7%	88.6%
PT	1,744	255	255	14.6%		100.0%
RO	24	7	7	29.2%	33.3%	100.0%
SI	60	14	14	23.3%	24.1%	100.0%
SK	87	11	11	12.6%	19.3%	100.0%
FI	97	0	0	0.0%	0.0%	
SE	229	1	0	0.0%		0.0%
UK	225	***	n.a.	0.0%		
EU-28 selection	16,178		1,523	9.4%		

* Denominator: the number of jobseekers who found employment during the first three months were deducted from the number of PDs U2 /SEDs U008 issued for up to three months.

** Selection: those MSs which reported the number of prolongations granted.

*** UK: Anecdotal evidence suggests there are few requests.

Source Administrative data PD U2 Questionnaire 2016

4. THE SUCCESS RATE AND IMPACT OF PROLONGATION

The total success rate (= the percentage of unemployed persons exporting their unemployment benefit who found work abroad) is calculated by dividing the number of persons who found work in another MS during the export period by the total number

of PDs U2 or SEDs U008 issued. Moreover, also the success rate during the first three months of the export period and the success rate during the prolongation period could be calculated.¹⁷

Approximately 1 in 10 of the unemployed persons with a PD U2 found work abroad. From a sending perspective, some 12% of the unemployed persons who exported their unemployment benefit found work (*Table 6*). However, the success rate during the export period varies markedly among MSs.¹⁸ The highest success rates are observed for unemployed persons coming from Latvia (40.6%), Finland (39.2%) and the Slovak Republic (34.5%). Furthermore, a remarkably low percentage of unemployed persons who received a PD U2 from the Netherlands, which is the main sending MS in absolute terms, found work abroad (only 1.3%). From a receiving perspective, some 11% of the unemployed persons who imported their unemployment benefit found work (*Table 7*). Especially unemployed persons who moved to Luxembourg found work (43.9%). This is in contrast to Romania (2.4%) and Poland (3.9%), which both show a very low success rate as receiving MS. The low success rate is remarkable especially for Poland, as this country is the main receiving MS in absolute terms. The low success rates for the Netherlands as sending MS and Poland as receiving MS suggest that the main objective of the export of unemployment benefits, namely to find employment abroad, is insufficiently accomplished.

In order to assess the impact of the prolongation period, a distinction should be made between the success rate during the first three months of the export period and the success rate during the prolonged export period. For seven issuing MSs which are granting a prolongation it was possible to calculate the success rate for both periods (*Table 6*).¹⁹ The average success rate increases for these MSs from approximately 10% after three months to approximately 24% after the prolongation period. However, the success rate after the prolongation period is mainly influenced by Spain, which shows a success rate of 54% during the prolonged export period. When excluding Spain, the success rate during the first 3 months amounts to 11.2%, the success rate during the prolonged period amounts to 9.3% and the total success rate amounts to 13.1% (or an increase by some 2 percentage points).

¹⁷ The success rates during the export period could be compared to the chance of finding work (during the first three months or during the prolonged export period) on the labour market of the competent MS or the chance of finding work (during the first three months or during the prolonged export period) by unemployed persons living in the MS where they are seeking work. This comparison should give us an answer to the question whether or not the export leads to a higher chance of finding employment during the first three months or in the event of prolongation after six months. The report of 2014 already discussed this question. Due to several methodological limitations, the results were tentative. For instance, we do not know if the unemployed persons exporting their unemployment benefit have characteristics similar to the 'native' unemployed persons. Therefore, more detailed information is required for a more thorough calculation and comparison.

¹⁸ Romania even stated that "*the success rate in taking up employment remains at a low level*".

¹⁹ EE, ES, LT, PL, RO, SI and SK.

Export of unemployment benefits

Table 6 The number of unemployed persons with a PD U2 who found work, by sending MS, 2015

Sending MS	Total number of PDs U2 issued (A)	No of prolongations granted (B)	No of persons who found work in another MS during the export period (C)	of which: No of persons who found work in another MS during the prolonged export period (if applicable) (D)	of which: No of persons who found work during the first 3 months E=(C-D)	Success rate during the first 3 months (E/A)	Success rate during the prolonged export period (D/B)	Total success rate (C/A)
BE	1,535	69	*	*	*			
BG	70	3	n.a.					
CZ	276	35	n.a.					
DK	1,569	0	156	0	156	9.9%		9.9%
DE	4,637	n.a.	677	142	535	11.5%		14.6%
EE	57	13	10	1	9	15.8%	7.7%	17.5%
IE	918	0	n.a.					
EL	n.a.	n.a.	n.a.					
ES	3,159	957	827	519	308	9.7%	54.2%	26.2%
FR	n.a.	n.a.	n.a.					
HR	68	0	9	0	9	13.2%		13.2%
IT	477	0	n.a.					
CY	102	n.a.	10		10	9.8%		9.8%
LV	293	97	119		119			40.6%
LT	128	31	18	2	16	12.5%	6.5%	14.1%
LU	225	n.a.	29	7	22	9.8%		12.9%
HU	76	0	2		2	2.6%		2.6%
MT	0	n.a.	n.a.					
NL	5,049	0	65		65	1.3%		1.3%
AT	2,013	n.a.	n.a.					
PL	262	31	18	2	16	6.1%	6.5%	6.9%
PT	1,744	255	*	*	*			
RO	24	7	3	1	2	8.3%	14.3%	12.5%
SI	60	14	2					3.3%
SK	87	11	30	4	26	29.9%	36.4%	34.5%
FI	97	0	38		38	39.2%		39.2%
SE	229	0	n.a.					
UK	225	n.a.	n.a.					
EU-28 selection	15,893		2013					12.7%
IS	549	n.a.	44		44	8.0%		8.0%
LI	n.a.	n.a.	n.a.					
NO	1,544	n.a.	n.a.					
CH	2041	n.a.	131		131	6.4%		6.4%
Total selection	18,483		2,188					11.8%
Only MSs granting prolong.***	3,777	1,064	908	529	377	10.0%	49.7%	24.0%

* PT and BE: the success rate has not been reported because of the use of too broad a definition.

** Selection: those MSs which reported the number of persons who found work in another MS during the export period.

*** Only MSs granting prolongation: this row only selects the MSs which grant an extension of the export period and also reported all the required figures. These success rates are mainly influenced by Spain. When excluding Spain, the success rate during the first 3 months is equal to 11.2%, the success rate during the prolonged period is equal to 9.3% and the total success rate is equal to 13.1%.

Source Administrative data PD U2 Questionnaire 2015

Table 7 The number of unemployed persons with a PD U2 who found work, by receiving MS, 2015

Receiving MS	Total number of PDs U2 or SEDs U008 received (A)	No of persons who found work in your MS during the export period (B)	Total success rate (B/A)
BE	624	n.a.	
BG	129	16	12.4%
CZ	223	51	22.9%
DK	230	n.a.	
DE	1,351	285	21.1%
EE	60	13	21.7%
IE	268	n.a.	
EL	n.a.	n.a.	
ES	1,858	246	13.2%
FR	n.a.	n.a.	
HR	54	4	7.4%
IT	19	n.a.	
CY	56	19	33.9%
LV	201	n.a.	
LT	360	26	7.2%
LU	148	65	43.9%
HU	212	14	6.6%
MT	108	21	19.4%
NL	457	99	21.7%
AT	823	n.a.	
PL	7,346	289	3.9%
PT	677	36	5.3%
RO	553	13	2.4%
SI	27	3	11.1%
SK	616	54	8.8%
FI	95	12	12.6%
SE	647	72	11.1%
UK	3,022	n.a.	
EU-28 selection*	14,977	1,338	8.9%
IS	84	22	26.2%
LI	n.a.	n.a.	
NO	396	n.a.	
CH	1,004	368	36.7%
Total selection*	16,065	1,728	10.8%

* Excluding BE, DK, IE, FR, EL, IT, LV, AT, UK, LI and NO.

Source Administrative data PD U2 Questionnaire 2016

5. RETURN TO THE COMPETENT MEMBER STATE

The unemployed person must return to the competent MS before the expiry of the period during which the unemployment benefit is retained. If the person concerned does not return in time, (s)he will lose all entitlement to benefits of the competent MS. Figures show, however, that only 13% of the persons return to the competent MS (*Table 8*). Almost all of the unemployed persons who received a PD U2 from Poland returned (93.1%). This in contrast to unemployed persons who received an authorisation from Romania (0.0%), Germany (1.0%), Slovenia (1.7%) or Switzerland (2.7%). Furthermore, the fact that the person concerned does not return, does not necessarily imply that (s)he has found employment abroad (see *section 4* and the last column of *Table 8*). These figures suggest that a high number of unemployed persons stay abroad even if they are no longer entitled to an unemployment benefit from the competent MS.

Table 8 The number of persons who returned and registered with the employment services in the competent MS before the end of the export period, by sending MS, 2015

	Total No of PDs U2 or SEDs U008 issued (A)	No of persons who returned and registered with the employment services in the competent MS before the end of the export period (B)	% who returned and registered with the employment services in the competent MS before the end of the export period (B/A)	% who found work abroad
BE	1,535	180	11.7%	
BG	70	n.a.		
CZ	276	n.a.		
DK	1,569	471	30.0%	9.9%
DE	4,637	48	1.0%	14.6%
EE	57	14	24.6%	17.5%
IE	918	n.a.		
EL	n.a.	n.a.		
ES	3,159	606	19.2%	26.2%
FR	n.a.	n.a.		
HR	68	2	2.9%	13.2%
IT	477	n.a.		
CY	102	3	2.9%	9.8%
LV	293	52	17.7%	40.6%
LT	128	3	2.3%	14.1%
LU	225	10	4.4%	12.9%
HU	76	n.a.		2.6%
MT	0	n.a.		
NL	5,049	n.a.		1.3%
AT	2,013	n.a.		
PL	262	244	93.1%	6.9%
PT	1,744	388	22.2%	
RO	24	0	0.0%	12.5%
SI	60	1	1.7%	3.3%
SK	87	8	9.2%	34.5%
FI	97	n.a.		39.2%
SE	229	77	33.6%	
UK	225	n.a.		
IS	549	55	10.0%	8.0%
LI	n.a.	n.a.		
NO	1,544	n.a.		
CH	2,041	56	2.7%	6.4%
Total selection*	16,769	2,218	13.2%	11.8%

* Excluding BE, DK, IE, FR, EL, IT, LV, AT, UK, LI and NO.

Source Administrative data PD U2 Questionnaire 2016

6. PRACTICAL IMPLEMENTATION OF THE RULES

The unemployed person has to fulfil several conditions before leaving and on arrival to receive the unemployment benefit in another MS. Some MSs report that these conditions are not always fulfilled. Cyprus reports that in some cases unemployed persons return to their MS of residence without fulfilling the requirement to have remained available to the employment services of Cyprus for at least four weeks. Italy states that in many cases, unemployed persons do not respect the rule of prior communication. Finally, Greece reports that unemployed persons sometimes leave the country without requesting a PD U2, which was confirmed by Hungary. Also, they do not always register with the employment services of the receiving MS within seven days. These cases might suggest that unemployed persons are not sufficiently aware of their rights and duties and highlight the importance of raising awareness. If unemployed persons are not aware of these rights/duties, they might also fail to assert/fulfil them when they move to another MS without a PD U2.

Although the conditions to export unemployment benefits are not always fulfilled, MSs are not aware of cases of inappropriate use of PD U2.

As described before, the authorisation to export an unemployment benefit to another MS results into a well-determined administrative procedure between the competent institutions of the sending and receiving MS. Nonetheless, as reported by the MSs the procedure causes problems or concerns in some cases.

The problems/concerns most frequently reported by the MSs are:

- delays in or not receiving confirmation of the registration (SED U009) of the unemployed person with the unemployment services in the MS where (s)he is seeking work with a PD U2 (BG, CZ, HR, PT, SK, SE and IS);
- delays in or not receiving a monthly follow-up (SED U0013) (BG, CZ, EE, HR, LV, MT and SK);
- delays in reporting circumstances which could affect the entitlement (SED U010) (CZ and SE);
- no reply to the question whether a person has been granted a PD U2 (SED U007) (SE);
- difficulties in being accepted as a jobseeker in the receiving MS (CZ, EE and LV);
- time pressure to issue the PD U2 when the unemployed person requests the document shortly before leaving (NL).

7. AWARENESS-RAISING POLICIES

A possible tool to increase the mobility of unemployed persons is the launch of information campaigns or events to raise awareness about the EU provisions on the export of unemployment benefits. However, based on the input received from the MSs we tend to conclude that efforts to increase awareness and knowledge about the export of unemployment benefits are still limited.

The competent institutions²⁰ and the public employment services²¹ inform jobseekers mainly via their website or by organising or participating in seminars and information sessions. Another channel which is used to inform unemployed persons about their right to export their unemployment benefits is EURES (via advisors, job fairs, the website).²²

²⁰ E.g. in CZ, DK, EL, LT, NL, AT, RO, SK, FI, UK and IS.

²¹ E.g. in DK, HR, HU, RO, and SE.

²² E.g. in DE, EE, MT, LV, HU, PT and AT.

ANNEX I PD U2 QUESTIONNAIRE

1. Reporting state:
2. Reporting institution (*please provide full contact details*):
3. Export of unemployment benefits **from your Member State** in accordance with Article 64 of Regulation (EC) No 883/2004 (*please complete the table below*):

Reference period ⁽²³⁾:

	No of PD U2 or SED U008 issued ⁽²⁴⁾		Export prolongations		Reintegration in the labour market ⁽²⁵⁾		Return to competent MS	Length of export period
	No of PD U2 or SED U0008 issued for up to 3 months	No of PD U2 of SED U008 issued for more than three months ⁽²⁶⁾	No of requests for prolongation of export beyond the minimum period of 3 months	No of prolongations granted	No of persons who found work in another MS during the export period ⁽³⁾	of which: No of persons who found work in another MS during the prolonged export period (if applicable) ⁽³⁾	No of persons who returned and registered with the employment services in your MS before the end of the export period	Average length of the export period during which the benefits were paid
T o t a l	0	0	0	0	0	0	0	

Additional comments:

(data sources, data limitations etc.)

4. Export of unemployment benefits **to your Member State** in accordance with Article 64 of Regulation (EC) No 883/2004 (*please complete the table below*):

Reference period:

	Registrations	Reintegration in the labour market ⁽³⁾	
	No of persons who registered as a jobseeker on the basis of PD U2 or on the basis of SED U008 ⁽²⁷⁾	No of persons who found work in your MS during the export period ⁽³⁾	of which: No of persons who found work in your MS during the prolonged export period (if applicable) ⁽³⁾
T o t a l	0	0	0

Additional comments:

(data sources, data limitations etc.)

²³ Please provide data concerning documents or decisions issued within the reference period.

²⁴ Please count only one document per individual case. If you issue both PD U2 and SED U008 in an individual case, count only one of these documents per case. Do not count documents that have been revised or corrected.

²⁵ Please answer this question whenever possible.



²⁶ Please count here documents issued by the institutions **directly for a longer than the minimum period** of three months (without recourse to a prolongation procedure).

²⁷ If both PD U2 or SED U008 were issued in an individual case, please count only one of these documents per case.

5. Have you carried out any information campaigns or awareness-raising events on the EU rules on export of unemployment benefits in your country? If yes, which ones and for which target groups (citizens, employment services, etc.)?
6. Have you carried out an assessment, survey or study at national level on the export of unemployment benefits in the past? If yes, please refer to or present the results.
7. Does your Member State have criteria for assessing requests for prolongation of the period of export? If yes, what are they? If not, on what basis do you assess the requests for prolongation?
8. What is your Member State's experience of the practical implementation of the rules on export of unemployment benefits?
9. Have you any reports on cases of inappropriate use of a Portable Document U2 in relation to your Member State? If possible, please provide quantitative or anecdotal evidence, or refer to national court cases.
10. What are the national procedures in your Member State for dealing with complaints of unemployed persons concerning the export of unemployment benefits²⁸?

²⁸ These can concern complaints regarding the various steps of the procedure (for example: a refusal to authorise the export, a refusal to prolong the export period, delays in the payments of benefits, etc.).

ANNEX II PORTABLE DOCUMENT U2

Coordination of Social Security Systems

Retention of unemployment benefit entitlement
EU Regulations 883/04 and 987/09 (*)

INFORMATION FOR THE HOLDER

You may receive unemployment benefit up to the date shown in box 2 from your institution issuing this document, if you:

- + are moving to another EU State to look for work.
- + register as a jobseeker with the employment services in that State, submit to their control procedures.
- + register within 7 days (see box 2) of the date you ceased to be available to the employment service of the State you left. If you register after this date, your benefit will only be paid from the day you register.
- + continue to meet the conditions of the Member State you left.
- + meet the conditions of the Member State where you are seeking work.

1. PERSONAL DETAILS OF THE HOLDER

1.1 Personal Identification Number Female Male

1.2 Surname

1.3 Forenames

1.4 Surname at birth (*)

1.5 Date of birth 1.6 Nationality

1.7 Place of birth

2. PERIODS FOR WHICH UNEMPLOYMENT BENEFITS MAY BE PAID BY THE INSTITUTION ISSUING THIS DOCUMENT

The holder is entitled to unemployment benefit from the office issuing this document

2.1 From and either 2.2.1 to (date)
or 2.2.2 for a maximum of (days)

Benefit is payable in principle if the holder registered with the employment service in the State where he/she is seeking work

2.2 at the latest by

and can continue to be paid for the above period if he/she remains registered and subject to controls by the State where he/she is seeking work throughout the period. However benefits can only continue to be paid from the date in 2.1 and for as many days as the entitlement to unemployment benefits under the law of the office issuing this document exists.

[*] Regulations (EC) No 883/2004, article 64, and 987/2009, article 55 (1).

(**) Information given to the institution by the holder when this is not known by the institution.

U2



Retention of unemployment benefit entitlement

3. SUPPLEMENTARY INFORMATION FOR THE HOLDER

3.1 Notification of registration

The employment service in the State where you are seeking work must immediately inform the office that issued this document of the date on which you first registered in its territory and of your address there.

3.2 Monthly reporting

The employment service in the State where you are seeking work

3.2.1 is required

3.2.2 is not required to send monthly reports to the office that issued this document

3.3 Changes of circumstances

The payment of benefits may be suspended by the State issuing this document if any of the circumstances below occur. The employment service where you are seeking work must immediately notify the issuing State if any of the following applies to you and from which date. You:

- + take up employment or become self-employed
- + receive earnings from an activity other than those mentioned above
- + refuse a job offer or interview request from the employment services
- + refuse to participate in occupational rehabilitation
- + are suffering from incapacity for work
- + do not submit to control procedures
- + are not available to the employment services
- + other

4. INSTITUTION COMPLETING THE FORM

4.1 Name

4.2 Street, N°

4.3 Town

4.4 Post code

4.5 Country code

4.6 Institution ID

4.7 Office fax N°

4.8 Office phone N°

4.9 E-mail

4.10 Date

4.11 Signature

STAMP

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