

Course Description

Course title:	Finances of the Pension System	
Neptun code:		
Type (core, specialization, optional, dissertation, other):	optional	
Lecture/ Seminar (practical); hours per week:	2 seminars (practical)/week	
Name and position of lecturer:	Zoltán Varga, associate professor, PhD	
Contact of lecturer:	civdrvz@uni-miskolc.hu	
Prerequisite course(s):		
Language of the course:	English	
Suggested semester: autumn /spring, 1-6	autumn or spring	
Number of credits:	3	
Requirements (exam/practical mark/signature/report, essay):	report, essay	
Course objectives (50-100 words):	<p>The course intends to give an overview of the finances of the pension systems in the Member States of the European Union, especially in Hungary.</p> <p>The course tries to demonstrate the most important steps to the sustainability of the pension systems, and the results of the pension reforms in the Central Europe. The main subject matter is the Hungarian pension system in particular and its problems nowadays.</p> <p>It is necessary to be stated, that the pension system has a hundred year history. It is a very special area, which is determined by the social security law, the financial law, economics, demography and sociology, and also affected by private law.</p> <p>Another subject is the coordination of social security systems in the European Union. The coordination provisions establish common rules and principles which have to be observed by all national authorities, social security institutions, courts and tribunals when applying national laws. By doing so, they ensure that the application of different national legislations does not adversely affect persons exercising their right to move and to stay within EU Member States. In other words, a person who has exercised the right to move within Europe may not be placed in a worse position than a person who has always resided and worked in one single Member State. A migrant worker could face problems due to the fact that in some Member States, access to social security coverage is based on residence, whilst in others only persons exercising an occupational activity (and the members of their families) are insured. In order to avoid a situation where migrant workers are either insured in more than one Member State or not at all, the coordination provisions determine which national legislation applies to a migrant worker in each particular case.</p>	
Course structure:	Week	Topic
	1.	Historical background
	2.	The Pension System Reform-1997
	3.	Changes in the 1997-2011 period
	4.	The reform of the two-pillar statutory pension system in 2010-2012
	5.	Regulations effective from 2012
	6.	Eligibility criterion: service time, Calculating the pension amount
	7.	The benefits for persons with changed capacity, Survivors' (bereavement) benefits
	8.	Old-age pension benefits, Amount of old-age pension, Service time
	9.	Dependent's benefits I.: Widow's Pension, Orphan's Benefits, Parent's Benefits
	10.	Dependent's benefits II. : Accident-related Dependent's Benefits, Widow's Benefits
	11.	Enforcement of claims, procedural regulation
	12.	Miscellaneous Provisions for the Enforcement of Claims
	13.	Liability regulations, remedy

<p>Required readings:</p>	<p>Varga Zoltán: Pension policy from financial point of view in the European Union In: Kékesi Tamás (szerk.) The Publications of the MultiScience - XXX. microCAD International Multidisciplinary Scientific Conference. Konferencia helye, ideje: Miskolc, Magyarország, 2016.04.21-2016.04.22. Miskolc: University of Miskolc, 2016. Paper E-11. 8 p. (ISBN:978-963-358-113-1)</p> <p>Varga Zoltán: Financial Aspects of the old-age pensions' coordination In: Miskolci Egyetem (szerk.) The Publications of the MultiScience - XXIX. microCAD International Multidisciplinary Scientific Conference. Konferencia helye, ideje: Miskolc, Magyarország, 2015.04.09 Miskolc: Miskolci Egyetem, 2015. Paper ISBN 978-963-358-061-5. 7 p. (ISBN:ISBN 978-963-358-061-5)</p>
<p>Recommended readings:</p>	<p>Hajdú, József: Coordination of the old-age pension in the EU In: Emlékkönyv Román László születésének 80. évfordulójára. Pécs 2008.</p> <p>Varga, Zoltán: Adategyeztetési eljárás a nyugdíjbiztosításban. In: Hallók Tamás (szerk.) Publicationes Universitatis Miskolciensis: Sectio Juridica et Politica. 366 p. Miskolc: Miskolc University Press, 2015. pp. 192-199.(XXXIII.)</p> <p>Varga, Zoltán: Koordinációs szabályok a nyugdíjbiztosításban. In: Paulovics Anita (szerk.) Decem anni in Europaea Unione IV.: Államtudományi tanulmányok. 310 p. Konferencia helye, ideje: Miskolc, Magyarország, 2014.09.11 Miskolc: Miskolci Egyetemi Kiadó, 2015. pp. 272-299.(Miskolci Jogtudományi Műhely; IV.) (ISBN:978-963-358-099-8)</p> <p>Könyvrészlet/Könyvfejezet/Tudományos</p>
<p>Evaluation method:</p>	<p>An essay will take place on the basis of the determined topics, the obligatory readings and the materiel of the lectures.</p> <p>There is a five-scale grading (1-5) where the thresholds are determined as follows: 0-60% fail, 61-70% pass, 71-80% satisfactory, 81-90% good, 91-100% excellent.</p>