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# Gateway Policy Explorer: Retirement Series

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## Germany

### Public Old-Age Social Assistance Plan Details

**1992-2023**

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## Preface

This document is intended for researchers who want to understand the evolution of policy or the policy in place at a particular point in time. This document is not intended for financial advice or to aid in decision-making. The authors have made significant effort to identify and collect historical information pertaining to these policies, to accurately represent these policies, and to communicate how policies may interact to determine legal requirements, eligibility for benefits, and/or benefits levels. The policies presented in this document focus on rules applicable to most individuals aged 50 and older from 1992. Many systems include special policies or alternative eligibility rules for specific groups. We encourage all users to complete their own review of literature in this area depending on the research questions they have in mind.

If you have feedback or questions or identify an error, please contact [policy@g2aging.org](mailto:policy@g2aging.org).

## Background — Gateway Policy Explorer: Retirement Series

The *Gateway Policy Explorer* (<http://g2aging.org/policy-explorer>) is part of the Gateway to Global Aging Data (<http://g2aging.org>) project. The *Retirement Series* captures historical policy that affects the birth cohorts of respondents in the surveys covered by the Gateway. It was motivated by the rapid evolution of policies affecting older people across the world. As the Health and Retirement Study (HRS) began in 1992 and many of the international network of studies (HRS-INS) cover more than a decade, understanding the policies in place at the time of the survey has become more demanding for researchers.

*Why are we tracking past policy?* Individuals make choices based on current policies and the outcomes we see today may reflect responses to past policies. When interpreting the survey responses of individuals, an understanding of the policy environment under which those individuals operate is critical. The collection of contextual information in the *Gateway Policy Explorer* aims to support researchers who want to understand or use policy changes in their research and provide context for longitudinal or cross-country differences. Over the period 2023–2026 the *Gateway Policy Explorer* will be expanded to include information on retirement, long-term care, education, and other policies affecting the life cycle.

The key dimensions to the *Gateway Policy Explorer: Retirement Series* are country and time. We prioritize data collection for each country based on its first interview wave and are continuing to expand our data collection back in time to 1992, the earliest survey date in the HRS-INS.

A separate document, like this one, is developed for each country and each broad category of policies covered in the *Gateway Policy Explorer: Retirement Series*.

## Author and Contributor Disclaimers

† The opinions expressed here are those of authors and do not necessarily reflect the views of the OECD or of its member countries.

## Germany

Old-Age Social Assistance  
Plan details 1992-2023 \* †

The Federal Government provides social assistance (sozialhilfe) to individuals residing in Germany who cannot support themselves. It is not restricted to the elderly. Social assistance benefits are only paid to those whose own income and assets do not meet the minimum subsistence level. From 2003, people over the age of 65 can qualify without a work requirement or a demonstrated inability to work.

### Key Dates

First law: 1961

Major changes since 1992: 2001

While social assistance laws have undergone many reforms since 1992, the basic design of the system has remained largely intact.

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\* If you have questions or suggestions, please contact [policy@g2aging.org](mailto:policy@g2aging.org).

† Detailed information and definitions are provided in tables, formulas and a glossary at the end of this document. To facilitate switching back and forth, this document is designed with hyperlinks. Most PDF readers have shortcuts that permit a reader to return to the previous location after selecting a hyperlink. In Adobe Acrobat on a PC: "Alt" + "←"; In Adobe Acrobat on a MAC: "command" + "←"; In Preview on a MAC: "command" + "[".

## Chapter 1: Policy enacted 1992-2000

### Overview

Any person residing in Germany who cannot support themselves by their own means (including income and assets) or efforts (joining the workforce), nor with the help of a third party, is entitled to basic income support in social assistance (Sozialhilfe). Social assistance benefits are needs-based. They are only paid to those whose own income and assets and, where applicable, those of their spouse or life partner do not meet the minimum subsistence level.

This principle was regulated by the *Federal Social Assistance Act* (Bundessozialhilfegesetz; BSHG) from 1962 to 2004 (Bundesgesetzblatt, 1961, 1994). BSHG did not specifically address social assistance in old age as a unique eligibility category for social assistance. BSHG required support of family members through maintenance requirements under German civil law.

In this chapter we highlight benefits available under BSHG prior to 2003, primarily based on the BSHG reform in 1994 (Bundesgesetzblatt, 1994).

### Eligibility

#### Age requirements to start benefits without penalty

- **Full eligibility age (FEA)**  
No age requirement. Eligibility is based on need only.

#### Requirements to be eligible to receive benefit

- **Does eligibility depend on the individual's current income (i.e., income tested)?** Answer: Yes
- **Does eligibility depend on the individual's current assets (i.e., asset tested)?** Answer: Yes
- **Details by benefit program:**

An individual is eligible for social assistance benefits if they satisfy all of the following conditions —

- Work requirement: Individual must work or have a demonstrated inability to work
- Limited means: Individual's own income and assets and those of their spouse or cohabiting partner are not sufficient to meet their needs under social assistance law. A means-test is applied. Details on the means-test are included in the benefits section of this chapter.
  - \* There is no presumption that individuals who live in a shared household with relatives or in-laws receive help with living expenses from them. However, any actual help received is taken into account against the standard rates.
  - \* Children or parents of sufficient means are legally required to support the entitled individual.

Source: §11, §90-91 of BSHG (Bundesgesetzblatt, 1994)

### Benefits

- **To receive a benefit, does an individual have to claim it?** Answer: Yes
- **To continue to receive a benefit, does an individual have to remain qualified?** Answer: Yes

#### Factors effecting computation of benefit entitlement

- **Does the benefit amount depend on the individual's birth year (regardless of age)?** Answer: No
- **Is the benefit adjusted if an individual delays claiming it?** Answer: No
- **Are future benefit entitlements adjusted for cost of living?** Answer: Yes
- **If so, what measure is used for adjustment?** The state governments must pass a legal ordinance by July 1 each year dictating the change in the standard rates used for social assistance. From July 1999, the increase is equal to the percentage change in old-age pension benefits (§22, BSHG, Bundesgesetzblatt, 1994).

#### Benefit formula

Social assistance is meant to provide for basic needs (Hilfe zum Lebensunterhalt), excluding institutional accommodation. The individual's needs are assessed first, and then their income and assets are deducted from the benefit. The assistance is paid where possible as a cash benefit. This assistance includes:

- **Standard rate:** A fixed amount paid each month to cover standard needs. The standard rates (Regelsätze) were set by the states during this period. The purpose of the standard rate is to cover expenditure such as for food, clothing and purchases of household appliances. The amounts of the standard rates vary according to the age and the beneficiary's position in their

household. The standard amounts are regularly adjusted and are referred to as standard needs levels (Regelbedarfsstufen). See:

- [Table 1](#) for definition of standard rate entitlement levels
- [Table 2](#) for standard rates by level and state for 2001 and 2003
- [Table 3](#) for standard rates by level for select states in West Germany for 1998-2004
- We have not identified standard rates prior to 1998
- Accommodation costs: The amount of actual expenses incurred (§12, 22, BSHG, [Bundesgesetzblatt, 1994](#))
- Heating costs: The amount of actual expenses incurred (§12, 22, BSHG, [Bundesgesetzblatt, 1994](#))
- An extra allowance, typically a fixed percentage of the standard rate, for additional needs is paid for costs not covered by the standard rate in special circumstances provided that the individual requirements are met (§23, BSHG, [Bundesgesetzblatt, 1994](#)). Among other things, this includes additional costs for persons eligible for benefits who are at least age 65 (20%), have a severe disability pass with a “G” entry (indicating “significantly restricted mobility in road traffic”; 20%), for expectant mothers and single parents (20%), or for those caring for children (40% - 60% based on circumstance).
- Other covered costs:
  - Rent arrears to avert eviction or to avert similar emergencies (§15a, BSHG, [Bundesgesetzblatt, 1994](#)).
  - One-time assistance for specific circumstances, for example: repair of clothing, household maintenance, purchase of long-lasting goods (§21, BSHG, [Bundesgesetzblatt, 1994](#))
  - Health and long-term care insurance premium can be paid, as can pension contributions (§13, 14, BSHG, [Bundesgesetzblatt, 1994](#)).

Additionally, a fixed sum loan may be granted in the case of undeniably necessary special items normally covered by the standard needs rate (§15b, BSHG, [Bundesgesetzblatt, 1994](#)).

Income from other sources and accumulated assets offset the amount of assessed need. Most income equally offsets benefits (i.e., 1€ of income reduces assistance by 1€), but exemptions exist. Key elements of income that are exempt from the social assistance offset include (§76, BSHG, [Bundesgesetzblatt, 1994](#)):

- Income taxes
- Contributions to public and private social insurance (e.g., health care, long-term care, pensions)
- Expenses associated with earning income or the promotion of work

All assets are included with the following exceptions (§88, BSHG, [Bundesgesetzblatt, 1994](#)):

- Assets provided from public funds
- Certain retirement savings accounts
- Beneficiary’s home
- Property to support maintenance of beneficiary’s home
- Household goods
- If in labor force, essential items for starting or maintaining employment
- Family heirlooms and items that satisfy intellectual and artistic curiosities (e.g., books, art supplies)
- Small amounts of cash (in 1992, this was 4,500 DM - see [Table 4](#) for historical limits)

Excludable assets are typically subject to limitations for extreme cases (e.g., an luxury home). In these cases, a transitional period is allowed (e.g., 6 months to sell the luxury) before it counts against the asset test. Alternatively, social assistance is treated as a loan, repayable when the property is liquidated or the beneficiary dies (§89, BSHG, [Bundesgesetzblatt, 1994](#))

A summary of how to compute social assistance benefits is available in [Formula 1](#). Examples for more recent social assistance policy are provided in the next chapter.

## Chapter 2: Policy enacted 2001-2023

### Policy change in 2001

The *Law on a needs-based basic security in old age and in the case of reduced earning capacity* (Grundsicherungsgesetz; GSiG), enacted in 2001 and effective from 2003, provided basic income support for those who reached the statutory retirement age. GSiG excluded maintenance requirements of children or parents with incomes below 100,000€.

Other key reforms during this period include:

- In December 2003, the *Law on the integration of social assistance law into the social code*, integrated BSHG and GSiG into the 12th book of the Social Security Code (SGB XII) from 2005 ([Bundesgesetzblatt, 2003](#))
- In April 2007, the *Age limit adjustment act*, gradually increase the statutory retirement age from age 65 to age 67 for those born after 1946 and before 1964 (i.e., reaching the statutory retirement age between 2012 and 2029)
- In December 2022, the *Citizen's Allowance Act* ([Bundesgesetzblatt, 2022](#)) changed annual benefit adjustments to include supplementary updates using an alternative price index and raised the asset limit

## Overview

Any person residing in Germany who cannot support themselves by their own means (including income and assets) or efforts (joining the workforce), nor with the help of a third party, is entitled to basic income support in social assistance (Sozialhilfe). Social assistance benefits are needs-based. They are only paid to those whose own income and assets and, where applicable, those of their spouse or life partner do not meet the minimum subsistence level.

This principle was regulated by the *Federal Social Assistance Act* (Bundessozialhilfegesetz; BSHG) from 1962 to 2004 ([Bundesgesetzblatt, 1961, 1994](#)). In 2003, the regulations of BSHG were replaced by the 12th book of the Social Security Code (SGB XII) from 2005 ([Bundesgesetzblatt, 2003](#)). BSHG did not specifically address social assistance in old age as a unique eligibility category for social assistance. BSHG requires support of family members through maintenance requirements under German civil law. The *Law on a needs-based basic security in old age and in the case of reduced earning capacity* (Grundsicherungsgesetz; GSiG), enacted in 2001 and effective from 2003, provided basic income support for those who reached their statutory retirement age. This was also integrated into SGB XII from 2005 creating a unified regulation for social assistance. GSiG excluded maintenance requirements of children or parents with incomes below 100,000€.

While the social assistance law has undergone many reforms since 1992, the basic design of the system has remained largely intact. In this chapter we highlight old-age social assistance benefits available under GSiG from 2003-2004 and under SGB XII since 2005 (as defined in §41-43, SGB XII).

## Eligibility

### Age requirements to start benefits without penalty

- **Full eligibility age (FEA)**

None if with a demonstrated inability to work, or be at least the statutory retirement age of own old-age benefit - age 65 to 67 depending on birth year (see [Table 5](#))

### Requirements to be eligible to receive benefit

- **Does eligibility depend on the individual's current income (i.e., income tested)?** Answer: Yes
- **Does eligibility depend on the individual's current assets (i.e., asset tested)?** Answer: Yes
- **Details by benefit program:**

An individual is eligible for social assistance benefits if they satisfy all of the following conditions —

- **Work or age requirement:** Individual must work, have a demonstrated inability to work, or be at least the statutory retirement age - age 65 to 67 depending on birth year (see [Table 5](#))
- **Limited means:** Individual's own income and assets and those of their spouse or cohabiting partner are not sufficient to meet their needs under social assistance law. A means-test is applied. Details on the means-test are included in the benefits section of this chapter.
  - \* There is no presumption that individuals who live in a shared household with relatives or in-laws receive help with living expenses from them. However, any actual help received is taken into account against the standard rates.

- \* Children or parents of sufficient means are legally required to support the entitled individual. From 2003, with the introduction of the [GSiG \(Bundesgesetzblatt, 2001\)](#), children or parents with annual incomes of less than €100,000 are not required to provide maintenance support (§2, [GSiG, Bundesgesetzblatt, 2001](#); §43 from 2005-2019, §94 (from 2020), [SGB XII, Deutsche Rentenversicherung, 2023a](#)).

## Benefits

- To receive a benefit, **does an individual have to claim it?** Answer: Yes
- To continue to receive a benefit, **does an individual have to remain qualified?** Answer: Yes

## Factors effecting computation of benefit entitlement

- Does the benefit amount depend on the individual's birth year (regardless of age)? Answer: No
- Is the benefit adjusted if an individual delays claiming it? Answer: No
- Are future benefit entitlements adjusted for **cost of living**? Answer: Yes
- If so, what measure is used for adjustment? Annual adjustments occurred at the local level prior to 2011 and have been adjusted annually by the Federal government since 2011. Since 2011, adjustments have been made on January 1 and use a "mixed index" that considers changes in consumer prices and the average development of net wages (§28a, [SGB XII, Deutsche Rentenversicherung, 2023a](#)). From 2023, this adjustment will also consider an alternative price index (known as the price index for standard requirements [regelbedarfsrelevanten preisindexes]) as part of what is known as a supplementary update.

## Benefit formula

Social assistance is meant to provide for basic needs (Hilfe zum Lebensunterhalt), excluding institutional accommodation. The individual's needs are assessed first, and then their income and assets are deducted from the benefit. The assistance is paid where possible as a cash benefit. This assistance includes:

- Standard rate: A fixed amount paid each month to cover standard needs. The standard rates (Regelsätze) were set by the states prior to 2011, but they have been effectively harmonized since 2005. The purpose of the standard rate is to cover expenditure such as for food, clothing and purchases of household appliances. The amounts of the standard rates vary according to the age and the beneficiary's position in their household. The standard amounts are regularly adjusted and are referred to as standard needs levels (Regelbedarfsstufen). See:
  - [Table 1](#) for definition of standard rate entitlement levels
  - [Table 6](#) for standard rates by level 2005-2023
  - [Table 2](#) for standard rates by level and state for 2001 and 2003
  - [Table 3](#) for standard rates by level for select states in West Germany for 1998-2004
  - We have not identified standard rates prior to 1998
- Accommodation costs: The amount of the actual rental cost —if the rental cost is found to be "unreasonably high," it is paid for as long as a move to less expensive accommodation remains impossible or unreasonable, up to a maximum of six months (§35, [SGB XII, Deutsche Rentenversicherung, 2023a](#)).
- Heating costs: The amount of actual expenses incurred, provided they are reasonable (§29, [SGB XII, Deutsche Rentenversicherung, 2023a](#)). Costs of centrally supplied hot water are likewise paid in the actual amount incurred. In the case of decentralized water heating (such as a boiler within the living unit), the additional cost is recognized (§30 (7), [SGB XII, Deutsche Rentenversicherung, 2023a](#)).
- An extra allowance, typically a fixed percentage of the standard rate, for additional needs is paid for costs not covered by the standard rate in special circumstances provided that the individual requirements are met (§30 of [SGB XII, Deutsche Rentenversicherung, 2023a](#)). Among other things, this includes additional costs for persons eligible for benefits who have a severe disability pass with a "G" entry (indicating "significantly restricted mobility in road traffic"; 17%), for expectant mothers and single parents (17%), to pay for decentralized water heating (2.3%), or for those caring for children (12% - 36% based on circumstance).
- Other covered costs:
  - Rent arrears to avert eviction or to avert similar emergencies (§36, [SGB XII, Deutsche Rentenversicherung, 2023a](#)).
  - One-time assistance for specific circumstances, for example: setting up a household, initial outfitting with clothes (including maternity needs), purchase and repair of orthopedic shoes, the repair and rental of therapy equipment (§31 of [SGB XII, Deutsche Rentenversicherung, 2023a](#))
  - Health and long-term care insurance premium can be paid, as can pension contributions (§32-33, [SGB XII, Deutsche Rentenversicherung, 2023a](#)).
  - Education and participation needs for children (§34, [SGB XII, Deutsche Rentenversicherung, 2023a](#))



Additionally, a fixed sum loan may be granted in the case of undeniably necessary special items normally covered by the standard needs rate (§37, SGB XII, [Deutsche Rentenversicherung, 2023a](#)).

Income from other sources and accumulated assets offset the amount of assessed needs. Most income equally offsets benefits (i.e., 1€ of income reduces assistance by 1€), but reduced offset rates and exemptions exist and have been added over time for people satisfying specific conditions. Key elements of income that are exempt from the social assistance offset include (§82(2), SGB XII, [Deutsche Rentenversicherung, 2023a](#)):

- Income taxes
- Contributions to public and private social insurance (e.g., health care, long-term care, pensions)
- Expenses associated with earning income or the promotion of work
- Prepayments made by beneficiaries associated with necessities (e.g., loans for housing or subsistence needs)

Specific reduced rates and exemptions, the sum of which we refer to as a combined exemption, include:

- Income from work or self-employment: Reduced rate of 30%; maximum combined exemption is 50% of the standard rate (§82(3), SGB XII, [Deutsche Rentenversicherung, 2023a](#))
  - From 2018, there is also an exemption of 100€ (§82(4), SGB XII, [Deutsche Rentenversicherung, 2023a](#))
- From 2021, income from old-age pensions, including the GRV old-age benefit and Riester and Rurup pensions, for persons with at least 33 GRV old-age pension contribution years: Reduced rate of 30% and 100€ exemption; maximum combined exemption is 50% of the standard rate (§82a, SGB XII, [Deutsche Rentenversicherung, 2023a](#))
- Additional reduced rates and exemptions are specified in §82 of SGB XII ([Deutsche Rentenversicherung, 2023a](#))

All assets are included with the following exceptions (§90, SGB XII, [Deutsche Rentenversicherung, 2023a](#)):

- Assets provided from public funds
- Certain retirement savings accounts, such as Riester and Rurup pensions
- Beneficiary's home
- Property to support maintenance of beneficiary's home
- Household goods
- If in labor force, essential items for starting or maintaining employment
- Family heirlooms and items that satisfy intellectual and artistic curiosities (e.g., books, art supplies)
- Small amounts of cash (in 2023, limits were 10,000€ for a single person and 20,000€ for a couple - see [Table 4](#) for historical limits)

Excludable assets are typically subject to limitations for extreme cases (e.g., a luxury home). In these cases, a transitional period is allowed (e.g., 6 months to sell the luxury) before it counts against the asset test.

A summary of how to compute social assistance benefits is available in [Formula 2](#) for benefits paid from 2005 (see previous chapter for benefits paid prior to 2005) and the following examples are provided:

- Nonworking single person over age 65: see [Box 1](#)
- Nonworking couple over age 65: see [Box 2](#)
- Working single person over age 65: see [Box 3](#)



## Tables and Formulas

**Table 1: Standard Requirements by Level (2023)**

Level	Standard requirements	Legal definitions
Level 1	For any adult (i.e., age 18 or older) who lives in private residential accommodation and to whom standard needs level 2 does not apply.	SGB II, §20, para. 2, sentence 1
Level 2	For any adult who lives together in shared private residential accommodation with a spouse or life partner or as a cohabiting couple.	SGB II, §20, para. 4
Level 3	For adults not satisfying conditions for levels 1 or 2 (e.g., living with children or in an institutional setting)	SGB II, §20, para. 2, sentence 2, number 2
Level 4	For a child from age 14 to 17	SGB II, §20, para. 2, sentence 2, number 1; SGB II, §23, para. 1
Level 5	For a child from age 6 to 13	SGB II, §23, para. 1
Level 6	For a child less than age 6	SGB II, §23, para. 1

**Source:** SGB II ([BMJV, 2023c](#))

Table 2: Standard Rate by Level by State 2001 and 2003

State	2001 Level 1	2001 Levels 2/3 [1]	2001 Level 4 [2]	2001 Level 5 [3]	2001 Level 6 [4]	2003 Level 1	2003 Levels 2/3 [1]	2003 Level 4 [2]	2003 Level 5 [3]	2003 Level 6 [4]
Baden-Württemberg	562 DM	450 DM	506 DM	365 DM	309 DM or 281 DM	297 €	238 €	267 €	193 €	163 € or 149 €
Bayern [5]	543	434	489	353	299 or 272	287	230	258	187	158 or 144
Berlin [6]	561	449	505	365	309 or 281	296	237	266	192	163 or 148
Brandenburg [6]	537	430	483	349	295 or 269	283	226	255	184	156 or 142
Bremen	561	449	505	365	309 or 281	296	237	266	192	163 or 148
Hamburg	561	449	505	365	309 or 281	296	237	266	192	163 or 148
Hessen	562	450	506	365	309 or 281	297	238	267	193	163 or 149
Mecklenburg-Vorpommern	535	428	482	348	294 or 268	282	226	254	183	155 or 141
Niedersachsen	561	449	505	365	309 or 281	296	237	266	192	163 or 148
Nordrhein-Westfalen	561	449	505	365	309 or 281	296	237	266	192	163 or 148
Rheinland-Pfalz	561	449	505	365	309 or 281	296	237	266	192	163 or 148
Saarland	561	449	505	365	309 or 281	296	237	266	192	163 or 148
Sachsen	535	428	482	348	294 or 268	282	226	254	183	155 or 141
Sachsen-Anhalt [6]	540	432	486	351	297 or 270	285	228	257	185	157 or 143
Schleswig-Holstein	561	449	505	365	309 or 281	296	237	266	192	163 or 148
Thüringen	535	428	482	348	294 or 268	282	226	254	183	155 or 141

Sources: 2001 values collected from Table 5 in Boss (2001); 2003 values collected from famerb.de (n.d.).

Notes: Monthly values from July of the year specified to June of the following year. DM indicates Deutschmarks. The standard rate does not include other basic security needs based on housing, heating, or additional permissible costs. Levels follow definitions in Table 1 except where noted.

<sup>1</sup> Category defined differently than 2021 standard: defined in this state during this period as additional household members from age 19

<sup>2</sup> Category defined differently than 2021 standard: defined in this state during this period as household member age 15-18

<sup>3</sup> Category defined differently than 2021 standard: defined in this state during this period as household member age 8-14

<sup>4</sup> Category defined differently than 2021 standard: defined in this state during this period as household member under age 8; if there are two values, the higher value pertains to children with a sole caretaker

<sup>5</sup> Minimum amounts set by the state authority. Local carriers determined the level of the standard rates.

<sup>6</sup>

<sup>6</sup> 2003 rates were provisional at the time the information was collected

**Table 3: Standard Rate by Level for Select West German States 1998-2004**

Period	Level 1	Levels 2/3 [ <sup>1</sup> ]	Level 4 [ <sup>2</sup> ]	Level 5 [ <sup>3</sup> ]	Level 6 [ <sup>4</sup> ]
July 1998 - June 1999	540 DM	432 DM	486 DM	351 DM	297 DM or 270 DM
July 1999 - June 2000	547	438	492	356	301 or 274
July 2000 - June 2001	550	440	495	358	303 or 275
July 2001 - December 2001	561	449	505	365	309 or 281
January 2002 - June 2002	286.33 €	229.57 €	258.20 €	186.62 €	157.99 € or 143.67 €
July 2002 - June 2003	293	234	264	190	161 or 147
July 2003 - December 2004	296	237	266	192	163 or 148
July 2004 - December 2004	296	237	266	192	163 or 148

**Sources:** Authors' collection of annual state laws entitled "Ordinance on the standard rates of social assistance" from Bremen and North Rhine-Westphalia [Verordnung über die Regelsätze der Sozialhilfe], 1998-2004

**Notes:** Monthly values. DM indicates Deutschmarks. The standard rate does not include other basic security needs based on housing, heating, or additional permissible costs. Levels differ slightly than those defined in Table 1. See specific notes for variations.

<sup>1</sup> Category defined differently than 2021 standard: defined in this state during this period as additional household members from age 19

<sup>2</sup> Category defined differently than 2021 standard: defined in this state during this period as household member age 15-18

<sup>3</sup> Category defined differently than 2021 standard: defined in this state during this period as household member age 8-14

<sup>4</sup> Category defined differently than 2021 standard: defined in this state during this period as household member under age 8; if there are two values, the higher value pertains to children with a sole caretaker

**Table 4: Asset limits by time period**

Period	Asset limit
1992 - 2001	4,500 DM
2002 - 2004	2,301 €
January 2005 - March 2017	2,600
April 2017 - 2022	5,000
2023	10,000

**Sources:** Amendments to "Regulation implementing §88 para. 2 No. 8 of the Federal Social Assistance Act" (February 11, 1988) and its successor regulation, "Regulation implementing of §90 para. 2 No. 9 of the Twelfth Book of the Social Code" from 2003; for 2023, see article 8 ([Bundesgesetzblatt, 2022](#))

**Notes:** These values apply for persons at least age 60 before April 2017 and then for adults eligible for social assistance since April 2017.

**Formula 1: Social assistance benefits after income offsets (1992-2004)**

$$B_{SA,i,t} = \text{Standard Allowance}_{i,t} + \text{Accommodation}_{i,t} + \text{Heating}_{i,t} + \text{Extra allowance}_{i,t} \\ + \text{Other costs}_{i,t} - \text{Exempt expenses}_{i,t} - \text{All other income and assets}_{i,t}$$

- $B_{SA,i,t}$  = Individual  $i$ 's old-age social assistance benefit at time  $t$ 
  - $B_{SA,i,t} = 0$  if the estimated value is negative
- Standard Allowance $_{i,t}$  = Standard allowance at time  $t$  based on  $i$ 's circumstances. See:
  - Table 1 for definition of standard rate entitlement levels
  - Table 2 for standard rates by level and state for 2001 and 2003
  - Table 3 for standard rates by level for select states in West Germany for 1998-2004
  - We have not identified standard rates prior to 1998
- Accommodation $_{i,t}$  = Accommodation costs incurred by individual  $i$  (if costs are shared with spouse, divide equally)
- Heating $_{i,t}$  = Heating costs incurred by individual  $i$  (if costs are shared with spouse, divide equally)
- Extra allowance $_{i,t}$  = Fixed percentage of the standard rate for additional needs paid for costs not covered by the standard rate if individual  $i$ 's circumstances satisfy one of the requirements for an extra allowance (§23, BSHG, [Bundesrat, 1994](#)). Among other things, this includes additional costs for persons eligible for benefits who are at least age 65 (20%), have a severe disability pass with a “G” entry (indicating “significantly restricted mobility in road traffic”; 20%), for expectant mothers and single parents (20%), or for those caring for children (40% - 60% based on circumstance).
- Other costs $_{i,t}$  = Additional covered costs incurred by individual  $i$  (if costs are shared with spouse, divide equally) —see main text or §12-14, 15a, 15b, 21, BSHG, ([Bundesrat, 1994](#))
- Exempt expenses $_{i,t}$  = Certain types of expenses are exempt from the income offset —these include:
  - Income taxes
  - Contributions to public and private social insurance (e.g., health care, long-term care, pensions)
  - Expenses associated with earning income or the promotion of work
- All other income and assets $_{i,t}$  = All other income, including work and pensions and non-exempt assets —see main text or §76 and §88 of BSHG ([Bundesrat, 1994](#)) for exempt assets (e.g., housing and small cash amounts are exempt such as 4,500 DM in 1992 for persons age 60 and older, see Table 4 for historical values)

**Sources:** Authors' interpretation of §12-14, 15a, 15b, 21-23, 76, 88, BSHG, ([Bundesrat, 1994](#))

**Note:** Additional details on specific inputs are provided in the benefits section of main text.

**Table 5: Statutory Retirement Age (SRA) by Birth Year for Regular Old-Age Pension (Eligibility Track 1)**

Birth Year	SRA
Before 1947	65 years
1947 - 1957	Varies, increases by one month per year. <b>Formula:</b> $y$ months + 65 years where $y$ is the number of years a person was born after 1946 <b>Example:</b> $y = 6$ if a person was born in January 1952, so they would be eligible at age 65 and 6 months (July 2017)
1958	66 years
1959-1963	Varies, increases by two months per year. <b>Formula:</b> $2 \times y$ months + 66 years where $y$ is the number of years a person was born after 1958 <b>Example:</b> $y = 4$ if a person was born in January 1960, so they would be eligible at age 66 and 4 months (May 2026)
After 1963	67 years

**Source:** §235 of SGB VI ([BMJV, 2023](#)).

**Table 6: Standard Rate by Level (2005-2023)**

Period	Level 1	Level 2	Level 3	Level 4	Level 5	Level 6
January 2005 - June 2006 (West Germany)	345	311	276	276	207	207
January 2005 - June 2006 (East Germany)	331	298	265	265	199	199
July 2006 - June 2007	345	311	276	276	207	207
July 2007 - June 2008	347	312	278	278	208	208
July 2008 - June 2009	351	316	281	281	211	211
July 2009 - June 2010	359	323	287	287	215	215
July 2010 - December 2011	359	323	287	287	215	215
2011	364	328	291	287	251	215
2012	374	337	299	287	251	219
2013	382	345	306	289	255	224
2014	391	353	313	296	261	229
2015	399	360	320	302	267	234
2016	404	364	324	306	270	237
2017	409	368	327	311	291	237
2018	416	374	332	316	296	240
2019	424	382	339	322	302	245
2020	432	389	345	328	308	250
2021	446	401	357	373	309	283
2022	449	404	360	376	311	285
2023	502	451	402	420	348	318

**Sources:** For 2005 to 2014, we referred to a summary table in [Bundesregierung \(n.d.\)](#). From 2015, updated values are reported annually on [bundesregierung.de](#), the Federal Government's website. For 2023 values, see [Bundesregierung \(2022\)](#).

**Notes:** Monthly values per calendar year unless otherwise noted. The standard rate does not include other basic security needs based on housing, heating, or additional permissible costs. Levels are defined in [Table 1](#).

**Formula 2: Social assistance benefits after income offsets (2005-2023)**

$$B_{SA,i,t} = \text{Standard Allowance}_{i,t} + \text{Accommodation}_{i,t} + \text{Heating}_{i,t} + \text{Extra allowance}_{i,t} \\ + \text{Other costs}_{i,t} - \text{Work income after exemptions}_{i,t} - \text{Retirement income after exemptions}_{i,t} \\ - \text{Exempt expenses}_{i,t} - \text{Spousal surplus}_{i,t} - \text{All other income and assets}_{i,t}$$

- $B_{SA,i,t}$  = Individual  $i$ 's old-age social assistance benefit at time  $t$ 
  - $B_{SA,i,t} = 0$  if the estimated value is negative, although negative values for members of a couple are counted as “Spousal surplus $_{i,t}$ ”
- Standard Allowance $_{i,t}$  = Standard allowance at time  $t$  based on  $i$ 's circumstances. See:
  - Table 1 for definition of standard rate entitlement levels
  - Table 6 for standard rates by level 2005-2023
  - Table 2 for standard rates by level and state for 2001 and 2003
  - Table 3 for standard rates by level for select states in West Germany for 1998-2004
- Accommodation $_{i,t}$  = Accommodation costs incurred by individual  $i$  (if costs are shared with spouse, divide equally)
- Heating $_{i,t}$  = Heating costs incurred by individual  $i$  (if costs are shared with spouse, divide equally)
- Extra allowance $_{i,t}$  = Fixed percentage of the standard rate for additional needs paid for costs not covered by the standard rate if individual  $i$ 's circumstances satisfy one of the requirements for an extra allowance —see main text or §30 of SGB XII ([Deutsche Rentenversicherung, 2023a](#))
- Other costs $_{i,t}$  = Additional covered costs incurred by individual  $i$  (if costs are shared with spouse, divide equally) —see main text or §30-37, SGB XII ([Deutsche Rentenversicherung, 2023a](#))
- Work income after exemptions $_{i,t}$  = Individual  $i$  income from work after accounting for exemptions:

$$\text{Work income after exemptions}_{i,t} = \text{Income(work)}_{i,t} - \min\left\{0.3 \times \text{Income(work)}_{i,t} \right. \\ \left. + \text{Exemption(work)}_t, 0.5 \times \text{Standard Allowance (Level 1)}_t \right\}$$

- $\text{Income(work)}_{i,t}$  = Individual  $i$ 's income for work or self-employment at time  $t$
- $\text{Exemption(work)}_t = 0\text{€}$  before 2018,  $\min\{0.7 \times \text{Income(work)}_{i,t}, 100\text{€}\}$  from 2018
- $\text{Standard Allowance (Level 1)}_t$  = Standard allowance for level 1 at time  $t$
- Retirement income after exemptions $_{i,t}$  = Individual  $i$ 's income from qualified retirement savings accounts and pensions after accounting for exemptions.

$$\text{Retirement income after exemptions}_{i,t} = \begin{cases} \text{Income(retirement)}_{i,t} - \min\left\{0.3 \times \text{Income(retirement)}_{i,t} + \text{Exemption(retirement)}_t, \right. \\ \quad \left. 0.5 \times \text{Standard Allowance (Level 1)}_t \right\}, & \text{if } \text{year} \geq 2021 \text{ and } i \text{ has 33 public} \\ \quad \text{old-age pension contribution years} \\ \text{Income(retirement)}_{i,t}, & \text{otherwise} \end{cases}$$

- $\text{Income(retirement)}_{i,t}$  = Individual  $i$ 's income from qualified retirement savings and pensions at time  $t$
- $\text{Exemption(retirement)}_t = \min\{0.7 \times \text{Income(retirement)}_{i,t}, 100\text{€}\}$
- $\text{Standard Allowance (Level 1)}_t$  = Standard allowance for level 1 at time  $t$
- Exempt expenses $_{i,t}$  = Certain types of expenses are exempt from the income offset —these include:
  - Income taxes
  - Contributions to public and private social insurance (e.g., health care, long-term care, pensions)
  - Expenses associated with earning income or the promotion of work
  - Prepayments made by beneficiaries associated with necessities (e.g., loans for housing or subsistence needs)
- Spousal surplus $_{i,t}$  = For couples, if individual  $i$ 's spouse  $j$  has a negative estimates of  $B_{SA,j,t}$ , then the absolute value of this amount is treated as surplus for  $i$ . If  $i$  is not married or  $B_{SA,j,t}$  is positive, then Spousal surplus $_{i,t} = 0$ .
- All other income and assets $_{i,t}$  = All other income and non-exempt assets —see main text or §90 of SGB XII ([Deutsche Rentenversicherung, 2023a](#)) for exempt assets (e.g., housing and small cash amounts are exempt such as 10,000€ for a single person and 20,000€ for a couple in 2023; see Table 4 for historical exemption values)

**Sources:** Authors' interpretation of §28, 30-37, 82-83, 90, SGB XII ([Deutsche Rentenversicherung, 2023a](#))

**Note:** Additional details on specific inputs are provided in the benefits section of main text.

**Box 1: Example of social assistance calculation (nonworking single person over age 65)**

In July 2006, Jane was 67 years old and had a severe disability card with the mark “G”. She lived in an apartment Bremen. The rent was 200€ per month, and she had heating costs of 20€ and additional monthly costs related to her disability of 40€. Jane received a widow’s pension after taxes of 250€. She has 3,000€ in a savings account but no additional assets outside of her household items, furniture, and books. Her social assistance benefit would have been computed as:

Standard Allowance <sub>i,t</sub> in July 2006 (see Table 6)	345€
+ Accomodation <sub>i,t</sub>	200€
+ Heating <sub>i,t</sub>	20€
+ Extra allowance <sub>i,t</sub>	58.65€ (for disability) = $0.17 \times 345$
+ Other costs <sub>i,t</sub>	40€
– Earned income after exemptions <sub>i,t</sub>	0€
– (Retirement income after exemptions <sub>i,t</sub> – Exempt expenses <sub>i,t</sub> )	250€
– Spousal surplus <sub>i,t</sub>	0€
– All other income and assets <sub>i,t</sub>	0€

Summing these items, we find that Jane was entitled to  $B_{SA, Jane, July 2006} = 413.65€$  if she applied for benefits. In the first month, should would have to draw down her savings until they were at 2,600€ (the level of excludable assets in Table 4), the exclusion amount so she would initially be entitled to less money. In subsequent months, she could receive the full amount.

Source: Example based on [Deutsche Rentenversicherung \(2023b\)](#)

**Box 2: Example of social assistance calculation (nonworking couple over 65)**

In July 2011, John and Mia were 68 years old. Rent for their home was 400€ per month, and they had heating costs of 50€. John received a monthly pension after taxes of 600€ and Mia received a monthly pension after taxes of 250€. Mia incurred 40€ of additional monthly costs for a permissible condition. They had no substantive assets outside of their household items, furniture, and books. Their social assistance benefit would have been computed as:

	John	Mia
Standard Allowance <sub>i,t</sub> in July 2011 for a couple living together (Level 2; see Table 6)	328€	328€
+ Accomodation <sub>i,t</sub>	200€	200€
+ Heating <sub>i,t</sub>	25€	25€
+ Extra allowance <sub>i,t</sub>	0€	0€
+ Other costs <sub>i,t</sub>	0€	40€
– Earned income after exemptions <sub>i,t</sub>	0€	0€
– (Retirement income after exemptions <sub>i,t</sub> – Exempt expenses <sub>i,t</sub> )	500€	250€
– Spousal surplus <sub>i,t</sub>	0€	47€
– All other income and assets <sub>i,t</sub>	0€	0€

Summing these items, we find that John’s estimate of  $B_{SA, John, July 2011} = -47€$ . John’s surplus would have been added to Mia’s ledger as spousal surplus. Mia’s benefit before John’s surplus was  $B_{SA, Mia, July 2011} = 343€$  and was 296€ after. If they applied, Mia would have been paid 296€ and John would not have been paid any social assistance.

Source: Example based on [Deutsche Rentenversicherung \(2023b\)](#)



**Box 3: Example of social assistance calculation (working single person over 65)**

In December 2009, Hans was single and 65 years old. He lived alone and his rent was 250€ per month, and he had heating costs of 30€. Hans worked and received a monthly income of 750€. He had no substantive assets outside of his household items, furniture, and books. His social assistance benefit would have been computed as:

Standard Allowance <sub><i>i,t</i></sub> in December 2009 (see Table 6)	359€
+ Accommodation <sub><i>i,t</i></sub>	250€
+ Heating <sub><i>i,t</i></sub>	30€
+ Extra allowance <sub><i>i,t</i></sub>	0€
+ Other costs <sub><i>i,t</i></sub>	0€
– Earned income after exemptions <sub><i>i,t</i></sub>	570.50€
	$= 750€ - \min\{0.3 \times 750€, 0.5 \times 359€\}$
– (Retirement income after exemptions <sub><i>i,t</i></sub> – Exempt expenses <sub><i>i,t</i></sub> )	0€
– Spousal surplus <sub><i>i,t</i></sub>	0€
– All other income and assets <sub><i>i,t</i></sub>	0€

Summing these items, we find that Hans was entitled to  $B_{SA,Hans,December\ 2009} = 68.50€$  if he applied for benefits.

**Source:** Example based on [Deutsche Rentenversicherung \(2023b\)](#)

## Sources

This section records key sources consulted when we collected the institutional details reported in this document. Archived versions of these sources are available at the Gateway Policy Explorer website (<http://g2aging.org/policy-explorer>).

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## Glossary of terms

This section summarizes key definitions from the main text. To facilitate switching back and forth, this document is designed with hyperlinks. Most PDF readers have shortcuts that permit a reader to return to the previous location after selecting a hyperlink. In Adobe Acrobat on a PC: “Alt” + “←”; In Adobe Acrobat on a MAC: “command” + “←”; In Preview on a MAC: “command” + “[”.

**BSHG:** Federal Social Assistance Act (Bundessozialhilfegesetz) is the German social assistance system effective from 1962 to 2004. Social assistance benefits are needs-based. They are only paid to those whose own income and assets and, where applicable, those of

their spouse or life partner do not meet the minimum subsistence level. BSHG requires support of family members through maintenance requirements under German civil law.

**Claimable Benefit:** A pension where the beneficiary must actively file a claim for benefits with the government's pension authority.

**Cost-of-Living Adjustments (COLA):** Adjustments after an individual begins receiving benefits that increase benefit payments, typically in line with consumer prices or average earnings.

**Eligibility Track 1:** Regular old-age pension (Regelaltersrente) is an eligibility track for unreduced old-age benefits that is based primarily on age with a minimal number of required contribution years.

**Eligibility Track 2:** Old-age pension for long-term insured persons (Altersrente für langjährig Versicherte) is an eligibility track for unreduced old-age benefits that permits starting benefits at an earlier age than eligibility track 1 if the person has 35 GRV contribution years.

**Eligibility Track 3:** Old-age pension for severely disabled (Altersrente für schwerbehinderte Menschen) is an eligibility track for unreduced old-age benefits that permits starting benefits at an earlier age than eligibility track 2 if the person has 35 GRV contribution years and is disabled.

**Eligibility Track 4:** Old-age pension for women (Altersrente für Frauen) is an eligibility track for unreduced old-age benefits that permits women to start benefits at an earlier age than eligibility track 1. In 2007, it is eliminated for women born after 1951.

**Eligibility Track 5:** Old-age pension for unemployed workers or workers in part-time employment (Altersrente wegen Arbeitslosigkeit oder nach Altersteilzeitarbeit) is an eligibility track for unreduced old-age benefits that permits individuals that are unemployed or working part-time to start benefits at an earlier age than eligibility track 1. In 2007, it is eliminated for persons born after 1951.

**Eligibility Track 6:** Old-age pension for particularly long-term insured persons (Altersrente für besonders langjährig Versicherte) is an eligibility track for unreduced old-age benefits that permits starting benefits at an earlier age than eligibility track 2 if the person has 45 contribution years. It was first introduced in 2012.

**Eligibility Track:** Requirements for an individual to start receiving an unreduced old-age pension benefit. An individual typically must satisfy only one eligibility track.

**Full Eligibility Age:** The age at which individuals are eligible to receive their full benefit. For dependent benefits or social assistance, the full eligibility age may differ from the statutory retirement age for own old-age pension benefits.

**FRG:** Federal Republic of Germany, also known as West Germany

**GDR:** German Democratic Republic, also known as East Germany

**GKV:** German statutory health insurance (Gesetzliche Krankenversicherung) regulated by the Fifth Book of the German Social Code (SGB V)

**GRV:** German compulsory old-age public pension system (Gesetzliche Rentenversicherung)

**GSiG:** The *Law on a needs-based basic security in old age and in the case of reduced earning capacity* (Grundsicherungsgesetz), enacted in 2001 and effective from 2003, provided basic income support for those who reached their statutory retirement age. This was also integrated into SGB XII from 2005 creating a unified regulation for social assistance. GSiG excluded maintenance requirements of children or parents with incomes below 100,000€.

**Qualified Benefit:** A benefit is qualified if an individual must continue to meet certain standards, such as a means test, to continue receipt of benefits.

**SGB XII:** Chapter 12 of the German Social Security Code. Germany's Social Assistance laws, including BSHG and GSiG were integrated into German Social Code from 2005 creating a unified regulation for social assistance.

**Statutory Retirement Age (SRA):** The age at which individuals are eligible to receive their full benefit. In the United States, this is known as the normal retirement age. In the United Kingdom, this is known as the state pension age.

## Version information

*Current Version: 2.1 (August 2023)*

### Version History

- 1.0 (March 2021): First version.
- 2.0 (May 2022): Content updated and references added.
- 2.1 (August 2023): Updated format, terminology, and values through 2023.

## Additional resources

The following resources provide additional details for the interested reader:

Deutsche Rentenversicherung (2023). *rvRecht - legal portal of the German pension insurance*.

Available at: <https://rvrecht.deutsche-rentenversicherung.de> [Full link embedded due to length; Available only in German]

Features: Provides current and historical versions to German pension insurance and social assistance laws.

Deutsche Rentenversicherung (2023). *Basic security for the needy*.

Available at: [https://www.deutsche-rentenversicherung.de/DRV/DE/Rente/In-der-Rente/Grundsicherung/grundsicherung\\_node.html](https://www.deutsche-rentenversicherung.de/DRV/DE/Rente/In-der-Rente/Grundsicherung/grundsicherung_node.html) [Available only in German]

Features: Provides basic overview of the current system for persons in old-age.

Portal Sozialpolitik (2022). Chronology of Social Assistance. Available at: <http://www.portal-sozialpolitik.de/index.php?page=sozialhilfe> [Available only in German]

Features: Provides a history of German social assistance.