

Chapter 3 data tables

Scheme Status by number of memberships	Purple 2008 (Extended)					Purple 2009				
	Open (Open and Part Open)	Closed to new members	Closed to future accruals	Winding up	Total	Open	Closed to new members	Closed to future accruals	Winding up	Total
Number of schemes										
5 to 99 members	715	1,187	620	111	2,633	570	1,165	602	102	2,439
100 to 999 members	948	1,711	586	55	3,300	819	1,693	601	49	3,162
1,000 to 4,999 members	390	448	66	9	913	348	455	64	10	877
5,000 to 9,999 members	82	104	6	-	192	63	107	9	1	180
Over 10,000 members	84	134	6	-	224	71	148	8	-	227
Total number of schemes	2,219	3,584	1,284	175	7,262	1,871	3,568	1,284	162	6,885
Total percentage of schemes	31%	49%	18%	2%	100%	27%	52%	19%	2%	100%
Number of memberships										
5 to 99 members	27,938	54,286	28,559	3,247	114,030	22,583	53,094	28,284	2,721	106,682
100 to 999 members	352,209	615,476	167,163	17,927	1,152,775	305,378	609,548	178,286	13,592	1,106,804
1,000 to 4,999 members	893,016	959,226	133,090	16,154	2,001,486	828,698	990,625	126,659	20,795	1,966,777
5,000 to 9,999 members	566,723	772,866	49,148	-	1,388,737	424,753	792,225	70,898	7,262	1,295,138
Over 10,000 members	3,689,507	4,149,356	115,944	-	7,954,807	2,977,210	4,841,348	121,758	-	7,940,316
Total number of memberships	5,529,393	6,551,210	493,904	37,328	12,611,835	4,558,622	7,286,840	525,885	44,370	12,415,717
Total percentage of memberships	44%	52%	4%	0%	100%	37%	59%	4%	0%	100%

Member Types by Number of Memberships	Purple 2008 (Extended)				Purple 2009			
	Active	Pensioner	Deferred	Total	Active	Pensioner	Deferred	Total
Number of memberships								
5 to 99 members	23,781	30,797	59,452	114,030	18,907	31,423	56,352	106,682
100 to 999 members	269,976	304,606	578,190	1,152,772	226,995	314,813	565,006	1,106,814
1,000 to 4,999 members	485,401	594,242	921,843	2,001,486	433,224	612,798	920,755	1,966,777
5,000 to 9,999 members	323,494	461,099	604,144	1,388,737	267,960	441,940	585,238	1,295,138
Over 10,000 members	1,683,032	3,117,086	3,154,689	7,954,807	1,651,995	3,089,244	3,199,077	7,940,316
Total number of memberships	2,785,684	4,507,830	5,318,318	12,611,832	2,599,081	4,490,218	5,326,428	12,415,727
Total percentage of memberships	22%	36%	42%	100%	21%	36%	43%	100%

Industry classification	Purple 2008 (Original)												
	Public Administration	Agriculture	Mining	Utilities	Construction	Wholesale	Transportation	Communications	Manufacturing	Finance, Insurance and Real Estate	Retail	Services	Total
Number of schemes													
Total number of schemes	34	61	52	84	220	646	326	37	2,146	1,164	382	1,546	6,698
Total percentage of schemes	1%	1%	1%	1%	3%	10%	5%	1%	32%	17%	6%	23%	100%
Liabilities													
Total s179 liabilities (£bns)	8.1	1.6	3.7	28.4	28.7	33.7	45.9	52.0	227.2	198.3	60.1	149.1	727.51
Total percentage of s179 liabilities	1%	0%	0%	3%	3%	4%	5%	6%	27%	24%	7%	18%	100%

Industry classification	Purple 2009												
	Public Administration	Agriculture	Mining	Utilities	Construction	Wholesale	Transportation	Communications	Manufacturing	Finance, Insurance and Real Estate	Retail	Services	Total
Number of schemes													
Total number of schemes	35	68	53	84	225	646	321	46	2,161	1,160	378	1,614	6,791
Total percentage of schemes	1%	1%	1%	1%	3%	9%	5%	1%	31%	17%	5%	23%	98%
Number of memberships													
Total number of memberships	117,393	43,511	41,101	313,347	426,667	500,130	609,967	487,130	3,581,212	2,706,679	1,342,632	2,135,746	12,305,575
Total percentage of memberships	1%	0%	0%	3%	3%	4%	5%	4%	29%	22%	11%	17%	100%
Liabilities													
Total s179 liabilities	9.52	2.05	4.90	34.77	33.60	35.34	52.05	60.84	262.13	231.23	68.00	176.82	971.25
Total percentage of s179 liabilities	1%	0%	1%	4%	3%	4%	5%	6%	27%	24%	7%	18%	100%

Chapter 4 data tables

s179 funding						
	Schemes in sample	Market value of assets (£ billions)	Total s179 liabilities (£ billions)	Balance (£ billions)	Weighted average funding level	Simple average funding level
Scheme size measured by number of members						
2009						
5 to 99 members	2,439	9.2	10.7	-1.4	87%	84%
100 to 999 members	3,162	68.0	91.3	-23.4	74%	72%
1,000 to 4,999 members	877	115.3	155.4	-40.1	74%	72%
5,000 to 9,999 members	180	81.0	103.7	-22.7	78%	75%
10,000+ members	227	506.9	619.9	-113.0	82%	81%
Total	6,885	780.4	981.0	-200.6	80%	77%
2009 rolled back to 2008						
5 to 99 members	2,439.0	9.8	9.2	0.6	106%	102%
100 to 999 members	3,162.0	74.4	78.8	-4.4	94%	91%
1,000 to 4,999 members	877.0	127.1	134.0	-7.0	95%	92%
5,000 to 9,999 members	180.0	89.4	89.4	-0.1	100%	96%
10,000+ members	227.0	556.4	533.3	23.1	104%	101%
Total	6,885.0	857.0	844.7	12.3	101%	95%

s179 funding... continued						
	Schemes in sample	Market value of assets (£ billions)	Total s179 liabilities (£ billions)	Balance (£ billions)	Weighted average funding level	Simple average funding level
Proportion of liabilities that are pensions in payment						
2009						
25% and less	2,986	110.4	170.4	-60.0	65%	69%
Between 25% and 50%	2,856	419.4	542.2	-122.8	77%	77%
Between 50% and 75%	863	228.5	248.2	-19.7	92%	94%
Between 75% and 100%	180	22.1	20.2	1.9	109%	115%
Total	6,885	780.4	981.0	-200.6	80%	77%
2009 rolled back to 2008						
25% and less	2,994	127.0	148.8	-21.8	85%	87%
Between 25% and 50%	2,841	467.2	466.6	0.6	100%	97%
Between 50% and 75%	872	240.8	211.8	29.0	114%	112%
Between 75% and 100%	178	21.9	17.5	4.4	125%	135%
Total	6,885	857.0	844.7	12.3	101%	95%

s179 funding... continued						
	Schemes in sample	Market value of assets (£ billions)	Total s179 liabilities (£ billions)	Balance (£ billions)	Weighted average funding level	Simple average funding level
Scheme status						
2009						
Open	1,871	276.9	352.8	-75.9	78%	74%
Closed to new entrants	3,568	474.8	590.4	-115.6	80%	77%
Closed to future accrual	1,284	25.8	35.0	-9.2	74%	76%
Winding up	162	2.9	2.8	0.1	103%	100%
Total	6,885	780.4	981.0	-200.6	80%	77%
2009 rolled back to 2008						
Open	1,871	311.3	304.0	7.4	102%	95%
Closed to new entrants	3,568	515.0	508.0	7.0	101%	96%
Closed to future accrual	1,284	27.8	30.3	-2.5	92%	93%
Winding up	162	2.9	2.4	0.4	118%	114%
Total	6,885	857.0	844.7	12.3	101%	95%

Buy-out funding						
	Schemes in sample	Market value of assets (£ billions)	Total buy-out liabilities (£billion)	Balance (£ billions)	Weighted average funding level	Simple average funding level
Scheme size measured by number of members						
2009						
5 to 99 members	2,439	9.2	14.5	-5.3	64%	62%
100 to 999 members	3,162	68.0	124.1	-56.1	55%	53%
1,000 to 4,999 members	877	115.3	211.9	-96.6	54%	53%
5,000 to 9,999 members	180	81.0	142.2	-61.2	57%	55%
10,000+ members	227	506.9	858.8	-351.9	59%	59%
Total	6,885	780.4	1351.6	-571.2	58%	56%
2009 rolled back to 2008						
5 to 99 members	2,439	9.2	14.6	-5.4	63%	61%
100 to 999 members	3,162	69.2	125.4	-56.1	55%	54%
1,000 to 4,999 members	877	117.6	214.1	-96.5	55%	54%
5,000 to 9,999 members	180	82.7	143.6	-60.9	58%	56%
10,000+ members	227	512.8	865.1	-352.3	59%	58%
Total	6,885	791.5	1,362.7	-571.2	58%	57%
Scheme status						
2009						
Open	1,871	276.9	480.4	-203.5	58%	56%
Closed to new entrants	3,568	474.8	819.1	-344.2	58%	56%
Closed to future accrual	1,284	25.8	48.3	-22.5	53%	55%
Winding up	162	2.9	3.8	-1.0	75%	72%
Total	6,885	780.4	1351.6	-571.2	58%	56%
2009 rolled back to 2008						
Open	1,871	290.2	484.5	-194.3	60%	57%
Closed to new entrants	3,568	472.9	825.7	-352.8	57%	57%
Closed to future accrual	1,284	25.7	48.7	-23.0	53%	55%
Winding up	162	2.7	3.9	-1.2	70%	66%
Total	6,885	791.5	1362.7	-571.2	58%	57%

Industry classification*	Purple 2009												
	Public Administration	Agriculture	Mining	Utilities	Construction	Wholesale	Transportation	Communications	Manufacturing	Finance, Insurance and Real Estate	Retail	Services	Total
Number of schemes by industry classification and s179 funding level													
Original 2008													
low to 50%	-	-	-	-	-	18	9	-	54	23	9	53	
50 to 75%		19	11	15	51	145	60	9	449	204	78	315	
75 to 100%	18	23	18	26	92	232	142	10	963	442	176	616	
Greater than 100%	11	16	15	38	64	230	112	14	632	479	110	509	
2009													
low to 50%	-	15	-	7	20	52	31	7	216	79	43	134	
50 to 75%	14	29	26	31	111	279	172	18	1119	442	171	466	
75 to 100%	13	15	19	35	68	215	71	13	572	408	116	476	
Greater than 100%	-	9	-	11	26	100	47	8	254	231	48	238	
s179 liabilities by industry classification in (£ billions)													
Original 2008													
Liabilities	7.4	0.9	3.0	24.5	23.9	28.2	40.0	44.3	201.2	175.8	47.7	130.5	727.5
Assets	7.1	1.0	2.8	26.6	28.9	26.6	43.3	53.9	202.5	194.5	52.0	140.0	779.1
2009													
Liabilities	9.5	2.1	4.9	34.8	33.6	35.3	52.1	60.9	262.1	231.2	68.0	176.8	
Assets	6.4	2.0	3.4	29.3	29.5	26.3	41.2	47.3	204.8	193.8	56.2	133.2	

* Total number of schemes and /or scheme liabilities may differ from those quoted elsewhere due to incomplete industry classification data for a small number of schemes. Cells marked with a '-' indicate values suppressed to preserve confidentiality. Values are suppressed where five or less schemes are found in that category