

Independent Fiscal Institutions in the EU Member States in 2015

Fields marked with * are mandatory.

SECTION 1: Developments in 2015
*1.1 Please choose from:
The fiscal institution was created in 2015
The fiscal institution was created before 2015 but never reported
The fiscal institution remained UNCHANGED in 2015
The fiscal institution was REFORMED in 2015
Additional information:
*1.2 Please indicate the date the reform entered into force (MM/YY):
_
*1.3 Please indicate the main reasons for the reform of the fiscal institution:

*1.4 Did the reform affect any of the areas below? (multiple replies possible)
Independence of the IFI (statutory base, funding arrangements, nomination and/or responsibilities of board members)
Activities/tasks of the IFI
Designation of the fiscal institution
Other
*"Independence of the IFI", please specify:
*"Activities/tasks of the IFI", please specify:
*"Designation of the fiscal institution", please specify:
Designation of the fiscal institution, please specify.
*"Other", please specify:
SECTION 2: General description of the fiscal institution
•
*2.1 Please indicate the official name of the fiscal institution in the language of your country:
*0.0 Diagon indicate the official abbreviation of the many of the first institution in the larger of
*2.2 Please indicate the official abbreviation of the name of the fiscal institution in the language of your country:

2.3 Please indicate the official name of the fiscal institution in English (if available):
2.4 Please indicate the official abbreviation of the name of the fiscal institution in English (if available):
*2.5 Please indicate the date when the legislation establishing the fiscal institution was approved (MM
/YY):
*2.6 Please indicate the date when the fiscal institution started operating (MM/YY):
Additional information:
*0 = 0
*2.7 Please provide a general description of the fiscal institution:
SECTION 3: Independence of the fiscal institution
*3.1 Please indicate which legal document(s) establishes the fiscal institution:
the constitution
an organic law or other form of reinforced law
an ordinary law
a government decree
a government decreea parliament decision

*other, please specify
Additional information:
*3.2 Please provide the title of the above legal document and, if relevant, its articles referring to the fiscal institution:
*3.3 Please specify on the status of the fiscal institution: It is a stand-alone body (not functionally attached to another institution) It is functionally attached to another body Other
* Please specify which body:
*Other, please specify:
Additional information

example in terms of IT systems, buildings, human resource management, communication services, budget integration etc.)
*3.5 Are the implementing provisions governing the organisation and functioning of the fiscal institutio grounded in national law, regulation or binding administrative provisions? Yes No
Additional information:
*3.6 Please provide a reference to these legal documents.
3.7 Please indicate who prepares the annual work program of the fiscal institution:
3.8 Has the fiscal institution the freedom to communicate publicly without any interference from othe bodies?
Yes, on fixed datesYes, at any time
O No
No, please specify:
Additional information:
dditional information:

3.9 Is the fiscal institution allowed to enter into contractual agreements with other entities/persons in order to draw additional/more specialised expertise (i.e. can it delegate some of its work)?
O Yes
No
*Yes, please specify:
Additional information:
*3.10 Does the fiscal institution have access to draft budgets and medium-term planning documents before they are publicly available?
O Yes
O No
Additional information:
*3.11 To what extent does the fiscal institution have access to non-public information allowing it to perform its tasks (multiple choice question)? (Please pick only one option from A1 to A3)
A1: it has full access to inside information in public administration, and public bodies have to respond to its requests
A2: it has a privileged but limited access (in scope or in time) to information in public administration
A3: it has access to internal documents pertaining to the preparation of the annual budget
it has access to internal budgetary information on the budget execution
it has access to non-public datasets for in-depth budget analysis
it has no privileged access to inside information
other
*Other, please specify:

Additional information:
*3.12 Please indicate the total amount of the 2015 budget of the fiscal institution (in million EUR):
*3.13 Please describe the funding arrangements of the fiscal institution:
*3.14 Is this funding mechanism grounded in national law? (regulation, administrative rules, other legal documents) Yes No
*Yes, please specify:
Additional information:
*3.15 Are there any other procedures ensuring that the fiscal institution enjoys a degree of stability in its funding over the medium-term? Yes No
* Yes, please specify:

Additional information:
*3.16 Does the fiscal institution have access to other sources of financing than the direct funding by the public sector?
Yes
O No
Additional information:
*3.17 What was in 2015 the proportion of the functioning costs of the fiscal institution that was not covered by the public sector direct funding (in %)?
Additional information:
*3.18 Please specify the size (i.e. number of members) of the governing/high-level board of the fiscal institution:
*3.19 Please specify the composition of the governing/high-level board of the fiscal institution:
Additional information:

*3.20 Please describe the nomination and appointment procedures of the governing/high-level board members of the fiscal institution:
*3.21 Is the selection procedure of governing/high-level members of the fiscal institution enshrined in a legally binding document (e.g. in the document setting its statutory regime)? Yes No
Additional information:
*3.22 What are the required conditions in terms of experience and competences of the potential governing/high-level members of the fiscal institution?
*3.23 Please specify the number of years of the terms of office of governing/high-level board members of the fiscal institution:
*3.23.1 Are the mandates of the governing/high-level board members renewable? O Yes No
Additional information:

*3.23.2 How many times can the mandates be renewed?
Once
O 2 times
O 3 times
More than 3 times
Additional information:
*3.24 Do the terms of office of the governing/high-level board members of the fiscal institution by default
start and end simultaneously?
O Yes
O No
Additional information:
Additional information:
*
*3.25 If not, please describe the staggered terms:
*3.26.1 Are the governing/high-level members of the fiscal institution permitted to hold public
administration positions during their terms of office?
O Yes
O No
Additional information:
*3.27 Are there other constraints/limitations?
© Yes
© No

"Other constraints, please, specify:
Additional information:
Additional information.
** 00 Pl
*3.28 Please specify how the governing/high level board of the fiscal institution adopts decisions and/or
releases opinions:
by consensus
by qualified majority
by (simple) majority
Other
* Other, please specify:
Additional information:
*3.29 Is there a chairman/president of the fiscal institution?
Yes
O No
A LPP and Comments and
Additional information:
*3.30 What are the powers of the chairman/president in relation to the governing/high-level board and
the fiscal institution as a whole?

Additional information:
*3.31 Apart from the governing board, please specify the approximate size of staff employed by the fiscal institution, in terms of full-time jobs, differentiating between e.g. economic researchers and administrative staff:
*3.32 Please describe the selection and appointment procedure of the staff of the fiscal institution:
SECTION 4: Activities of the fiscal institution
*4.1 Please specify the fields of activity of the fiscal institution according to its mandate:
it is limited to fiscal policy
it also covers other areas of economic analysis
Additional information:
*4.2 Please specify the areas of economic analysis of the fiscal institution other than fiscal policy (multiple choice question):
macroeconomics
industrial organisation/competition
international economics, trade
sectoral and/or regional economic activity
sectoral and/or regional economic activityfinancial markets
financial markets

*other, please specify:
Additional information:
*4.3 In the field of fiscal policy, please indicate the tasks fulfilled by the fiscal institution (multiple choice question):
Monitoring/assessment of compliance with numerical fiscal rules
Production/endorsement/assessment of macroeconomic and/or budgetary forecasts
Provision of analysis on fiscal policy developments
Issuing normative statements/recommendations regarding fiscal policy
Long-term sustainability assessment
 Quantification of short-term and long-term budgetary effects of envisaged policy measures and reforms
 Promotion of fiscal transparency (e.g. by examining the clarity of the budget bills; screening the legislation/fiscal documentation to make it more accessible and clear; etc.) Other tasks
*Provision of analysis on fiscal policy developments, please specify:
*Long-term sustainability assessment, please specify:
*Quantification of short-term and long-term budgetary effects of envisaged policy measures and reforms, please specify:

*Promotion of fiscal transparency, please specify:
*Other tasks, please specify:
Additional information:
*4.3.1 The IFI involvement in "Monitoring/assessment of compliance with numerical fiscal rules", is:
performed according to its official mandate
performed on a voluntary basis, with regular output
performed on a voluntary basis, with sporadic output (e.g. ad-hoc reports)
*4.3.2 The IFI involvement in "Production/endorsement/assessment of macroeconomic and/or budgetary forecasts", is:
performed according to its official mandate
performed on a voluntary basis, with regular output
performed on a voluntary basis, with sporadic output (e.g. ad-hoc reports)
*4.3.3 The IFI involvement in "Provision of analysis on fiscal policy developments", is:
performed according to its official mandate
performed on a voluntary basis, with regular output
performed on a voluntary basis, with sporadic output (e.g. ad-hoc reports)
*4.3.4 The IFI involvement in "Issuing normative statements/recommendations regarding fiscal policy", is:
performed according to its official mandate
performed on a voluntary basis, with regular output
performed on a voluntary basis, with sporadic output (e.g. ad-hoc reports)

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performed on a voluntary basis, with regular output
performed on a voluntary basis, with sporadic output (e.g. ad-hoc reports)
*4.3.6 The IFI involvement in "Quantification of short-term and long-term budgetary effects of envisaged
policy measures and reforms", is:
performed according to its official mandate
performed on a voluntary basis, with regular output
performed on a voluntary basis, with sporadic output (e.g. ad-hoc reports)
*4.3.7 The IFI involvement in "Promotion of fiscal transparency", is:
performed according to its official mandate
performed on a voluntary basis, with regular output
performed on a voluntary basis, with sporadic output (e.g. ad-hoc reports)
performed on a voluntary basis, with sporadic output (e.g. ad-noc reports)
SECTION 5: Fiscal institution monitoring compliance with numerical fiscal rules
*5.1 Are all national numerical fiscal rules monitored by the independent fiscal institution?
O Yes
O No
O No
*5.2 Please indicate the number of national numerical fiscal rules concerning which the independent
*5.2 Please indicate the number of national numerical fiscal rules concerning which the independent fiscal institution carries out compliance assessment:
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*5.2 Please indicate the number of national numerical fiscal rules concerning which the independent fiscal institution carries out compliance assessment: 1 2 3
*5.2 Please indicate the number of national numerical fiscal rules concerning which the independent fiscal institution carries out compliance assessment: 1 2 3 4
*5.2 Please indicate the number of national numerical fiscal rules concerning which the independent fiscal institution carries out compliance assessment: 1 2 3 4 5
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*Rule 1: Please select the type of rule:
Expenditure rule
Budget balance rule
Revenue rule
Debt rule
*Rule 1: Are all sectors of the general government covered by the rule? (Please note that for the purpose of this questionnaire we refer to the following sectors of the general government - central government, regional/state government, local government and social security. The questionnaire takes into account that some Member States may not have all of the sectors - in particular regional/state governments.) Yes No
*Rule 1: Please indicate the sector(s) of general government covered by the rule (multiple replies possible):
local government
regional government (autonomous regions or federated states)
central government
social security
other
*Other, please specify:
*Other, please specify: *Rule 1: Please indicate the estimated value of items covered by the rule as a percentage of general government expenditure (taking into account exclusions, if any): (in case of revenue rules, please indicate the estimated value as % of general government revenue)
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Expenditure rule
Budget balance rule
Revenue rule
Debt rule
*Rule 2: Are all sectors of the general government covered by the rule? (Please note that for the purpose of this questionnaire we refer to the following sectors of the general government - central government, regional/state government, local government and social security. The questionnaire takes into account that some Member States may not have all of the sectors - in particular regional/state governments.) Yes No
*Rule 2: Please indicate the sector(s) of general government covered by the rule (multiple replies possible):
local government
regional government (autonomous regions or federated states)
central government
social security
other
*Other, please specify:
*Other, please specify:
*Other, please specify:
*Rule 2: Please indicate the estimated value of items covered by the rule as a percentage of general
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*Rule 3: Please select the type of rule:
Expenditure rule
Budget balance rule
Revenue rule
Debt rule
*Rule 3: Are all sectors of the general government covered by the rule? (Please note that for the purpose of this questionnaire we refer to the following sectors of the general government - central government, regional/state government, local government and social security. The questionnaire takes into account that some Member States may not have all of the sectors - in particular regional/state governments.) Yes No
*Rule 3: Please indicate the sector(s) of general government covered by the rule (multiple replies possible):
local government
regional government (autonomous regions or federated states)
central government
social security
other
*Other, please specify:
*Rule 3: Please indicate the estimated value of items covered by the rule as a percentage of general
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 Expenditure rule
 Budget balance rule
Revenue rule
Debt rule
*Rule 4: Are all sectors of the general government covered by the rule? (Please note that for the purpose of this questionnaire we refer to the following sectors of the general government - central government, regional/state government, local government and social security. The questionnaire takes into account that some Member States may not have all of the sectors - in particular regional/state governments.) Yes No
*Rule 4: Please indicate the sector(s) of general government covered by the rule (multiple replies possible):
local government
regional government (autonomous regions or federated states)
central government
social security
other

*Other, please specify:
Other, please specify:
Other, please specify:
Other, please specify:
*Rule 4: Please indicate the estimated value of items covered by the rule as a percentage of general
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*Rule 5: Please select the type of rule:
Expenditure rule
Budget balance rule
Revenue rule
Debt rule
*Rule 5: Are all sectors of the general government covered by the rule? (Please note that for the purpose of this questionnaire we refer to the following sectors of the general government - central government, regional/state government, local government and social security. The questionnaire takes into account that some Member States may not have all of the sectors - in particular regional/state governments.) Yes No
*Rule 5: Please indicate the sector(s) of general government covered by the rule (multiple replies possible): local government regional government (autonomous regions or federated states) central government social security other
*Other, please specify:
*Rule 5: Please indicate the estimated value of items covered by the rule as a percentage of general government expenditure (taking into account exclusions, if any): (in case of revenue rules, please indicate the estimated value as % of general government revenue) more than 90% 70% - 90% 50% - 70% less than 50%

*Other monitored rules: Similarly to the 5 rules indicated above, please list all other rules monitored by the independent fiscal institution. For each rule: 1. provide a general description; 2. mention its type; 3. targeted sector(s); 4. coverage in % of general government.
*5.3 Please list other numerical fiscal rules which are NOT monitored by the independent fiscal institution. Similarly to the rules indicated above, for each rule please: 1. provide a general description; 2. mention its type, 3. targeted sector(s), 4. coverage in % of general government.
*5.4 Please indicate at which point of budgetary cycle monitoring/ assessment of compliance with numerical fiscal rules is carried out (multiple choice question). If not simultaneous for all monitored rules, please give additional details.
In the preparatory stage of the annual budget
During the budget execution
Once per year More than once per year, at a regular frequency in connection with key stages of the annual
More than once per year, at a regular frequency in connection with key stages of the annual budget cycle
■ More than once per year, at any time
Other
*If more than once per year, at a regular frequency in connection with key stages of the annual budget cycle, please specify:

*Other, please specify:
Additional information:
*5.5 Is the assessment of compliance with fiscal rules publicly available? If different approach applies
to various rules, please select "mixed approach" option.
© Yes
O 140
Mixed approach
*Mixed approach, please specify
minos approach, proace epoch,
Additional information:
Additional information.
*5.6 Does the assessment of compliance include an opinion on whether applicable escape clauses
should be triggered/extended/exited? If different approach applies to various rules, please select
"mixed approach" option.
O Yes
No
Mixed approach
*Mixed approach, please specify

Additional information:
*5.7 Please describe the reaction of the government in relation to the assessment of compliance with national numerical fiscal rules. If different approach applies to various rules, please give additional information.
The government has to take corrective steps
The government does not have to take corrective steps but it has to publicly explain why it does not take action
The government does not have to react, but it usually does
The government does not have to react, and it usually does not
Other
*Other, please specify:
Additional information.
Additional information:
SECTION 6: Fiscal institutions producing/endorsing/assessing forecasts
of macroeconomic and/or budgetary variables
*6.1 Please indicate the type of forecasts produced/endorsed/assessed by the fiscal institution (multiple choice question):
Macroeconomic forecasts
■ Budgetary forecasts
Additional information:

*6.2 Does the fiscal institution prepare/endorse/assess macroeconomic or budgetary forecasts for the general government as a whole? O Yes No
Additional information:
*6.3 Apart from the general government sector, please specify the sub-sectors of general government for which forecasts are prepared/endorsed/assessed by the fiscal institution (multiple choice question): Central government Regional government Local government Social security Other
*Other, please specify:
Additional information:
*6.4 In terms of macroeconomic forecasts, please specify:
The fiscal institution produces the macroeconomic forecasts which are used for the national fiscal planning
The fiscal institution produces macroeconomic forecasts, but these are not used for the national fiscal planning
The fiscal institution does not produce macroeconomic forecasts but has to endorse those prepared by other institution(s) for them to be used for fiscal planning
The fiscal institution provides an assessment of the macroeconomic forecasts prepared by other institution(s)
The fiscal institution is consulted at the start or during the preparation of macroeconomic forecasts
Other

* Please specify:
The fiscal institution produces the forecasts in-house
The fiscal institution sub-contracts the production of the forecasts to another entity but retains ultimate responsibility for their delivery
*Other, please specify:
Additional information:
6.5 Please indicate the role of the forecasts of macroeconomic variables for the preparation of the annual budget:
there is a legal or constitutional obligation to use the fiscal institution's forecasts
there is a political agreement that the fiscal institution's forecasts are generally used
the government is free to use its own forecasts, but deviations from the fiscal institution's forecasts have to be justified publicly
the government is free to use its own forecasts, without any obligation to provide justification for deviations from the fiscal institution's forecasts
Other
*Other, please specify:
Additional information:

*6.6 In terms of budgetary forecasts, please specify which variables are prepared/endorsed/assessed by the fiscal institution (multiple choice question):
government expenditures based on policy measures announced in specific documents (e.g.
budget law or specific economic policy decisions)
government revenues
government balancegovernment debt
other
*Other, please specify:
Additional information:
Additional information.
*6.7 In terms of budgetary forecasts, please specify:
The fiscal institution produces budgetary forecasts which are used for the national fiscal
planning
The fiscal institution produces budgetary forecasts, but these are not used for the national fiscal planning
The fiscal institution does not produce budgetary forecasts but has to endorse those prepared by other institution(s) for them to be used for fiscal planning
The fiscal institution provides an assessment of the budgetary forecasts prepared by other institution(s)
The fiscal institution is consulted at the start or during the preparation of budgetary forecasts
Other
* Diagon apositu
* Please specify:
The fiscal institution produces the forecasts in-house
The fiscal institution sub-contracts the production of the forecasts to another entity but retains ultimate responsibility for their delivery
* Other, please specify:

Additional information:
6.8 Please, indicate the role of the forecasts of budgetary variables for the preparation of the annual budget
there is a legal or constitutional obligation to use the fiscal institution's forecasts
there is a political agreement that the fiscal institution's forecasts are generally used
the government is free to use its own forecasts, but deviations from the fiscal institution's forecasts have to be justified publicly
the government is free to use its own forecasts, without any obligation to provide justification for deviations from the fiscal institution's forecasts
other
*Other, please specify:
Additional information:
*6.9 Please describe the involvement of the fiscal institution in the initial preparation stage of the forecasts and also in the stage when forecasts are updated:
*6.10 Does the fiscal institution provide an ex-post evaluation of macroeconomic and/or budgetary
forecasts? O Yes
No
- 110
*Please specify:
i iodoc opoony.

Additional information:
*6.11 Does the fiscal institution provide macroeconomic and/or budgetary long-term projections? O Yes No
*6.12 What sorts of long-term projections are provided, how often and for what purposes?
*6.13 Please specify the time horizon of the long-term projections (number of years):
Additional information:
*6.14 Please indicate whether the fiscal institution prepares medium-term projections to be used in the MTBF planning document (i.e. the medium-term plans):
*6.15 Please specify whether the macroeconomic forecasts produced/endorsed by the fiscal institution are used in the MTBF planning document (i.e. the medium-term plans) O Yes No
Additional information:

used in the MTBF planning document (i.e. the medium-term plans)
© Yes
O No
Additional information:
Section 7: Fiscal institutions issuing normative statements
/recommendations
*7.1 Please indicate the activities of the fiscal institution in the area of issuing normative statements
and recommendations (multiple choice question):
normative assessment of the draft government budget
recommendations on changes of fiscal policy measures specified in the draft government
budget
 normative assessment/monitoring in the implementation stage of the budget recommendations on changes of fiscal policy measures in the implementation stage of the
budget
normative assessment of economic programmes of political parties ahead of elections
other
*Please specify:
Additional information:
7.2 Please specify the way in which the government interacts with the fiscal institution in the planning
stage of the budgetary process: the government is obliged by law to consult the fiscal institution
 the government is obliged by law to consult the fiscal institution, though not obliged by law
 the government does not consult the fiscal institution
Other

*Please specify:
Additional information:
*7.3 Please specify the way in which the parliament interacts with the fiscal institution in the planning stage of the budgetary process:
the fiscal institution has to be auditioned by the parliament (legal obligation)
the fiscal institution is generally auditioned by the parliament, though there is no such legal obligation
there is no formal consultation of the fiscal institution by the parliament
other
*Please specify:
Additional information:
*7.4 Please specify if the fiscal institution provides normative assessment/recommendations of the draft government budget in terms of the following (multiple choice question): consistency with sustainable government finances
 adequacy in the prevailing cyclical conditions / appropriateness in terms of stabilisation compliance with the requirements of the SGP
compliance with the budgetary targets established in the MTBF/SCP framework
compliance with the national fiscal rules
quality of government finances, e.g. in terms composition of revenue and expenditure
other

*Please specify:
Additional information:
*7.5 How does the government react to the normative assessment/recommendations of the draft government budget provided by the fiscal institution?
it is obliged by law to follow recommendations or explain why it does not follow
it is obliged by law to react to the normative assessment of the draft budget
though not obliged by law, the government typically reacts (follows recommendations or explains the deviations, discusses the assessment etc)
it generally does not react
other
*Please specify:
Additional information:
Additional information.
*7.6 Please specify if the fiscal institution provides normative assessment/monitoring at the
implementation stage of the budget in terms of the following (multiple choice question):
implementation of the budget law in general, including alert in case of substantial deviations from plans
consistency with sustainable government finances
adequacy in the prevailing cyclical conditions / appropriateness in terms of stabilisation
compliance with the requirements of the SGP
compliance with the budgetary targets established in the MTBF/SCP framework
compliance with the national fiscal rules
quality of government finances, e.g. in terms of composition of revenue and expenditure
other

Additional information:	
*7.7 How does the government react to the normative assessment/monitoring provided by the institution at the implementation stage of the budget?	fiscal
it is obliged by law to react to the normative assessment	
though not obliged by law, the government typically reacts (follows recommendations of explains the deviations, discusses the assessment etc)	or
it generally does not react	
other	
*Please specify:	
A deltain and the forman ations	
Additional information:	
*7.8 Please specify if the fiscal institution provides normative assessment/recommendations o	f the
conduct of fiscal policy in a medium-term perspective in terms of the following (multiple choice	
question):	•
90001011).	
stringency of implementation of budget plans without major deviations or supplementar budgets	ry
stringency of implementation of budget plans without major deviations or supplementar	у
stringency of implementation of budget plans without major deviations or supplementar budgets	
 stringency of implementation of budget plans without major deviations or supplementar budgets consistency with sustainable government finances adequacy in the prevailing cyclical conditions / appropriateness in terms of stabilisation 	
 stringency of implementation of budget plans without major deviations or supplementar budgets consistency with sustainable government finances 	
 stringency of implementation of budget plans without major deviations or supplementar budgets consistency with sustainable government finances adequacy in the prevailing cyclical conditions / appropriateness in terms of stabilisation compliance with the requirements of the SGP 	
 stringency of implementation of budget plans without major deviations or supplementary budgets consistency with sustainable government finances adequacy in the prevailing cyclical conditions / appropriateness in terms of stabilisation compliance with the requirements of the SGP compliance with the budgetary targets established in the SCP framework 	1

*Please specify:
Additional information:
SECTION 8: Compliance in 2015
*8.1 Please indicate the type of outputs/assessments/recommendations produced in 2015 by the fiscal institution (multiple choice question):
Assessment of compliance with fiscal rules
Endorsement of macroeconomic and/or budgetary forecasts
Assessment of macroeconoic and/or budgetary forecasts
Production of macroeconomic and/or budgetary forecasts
Other assessments/recommendations
No assessment/recommendation produced
*Assessment of compliance with fiscal rules, please specify:
*Please specify the concrete way in which the fiscal institution gave or not its endorsement of Macroeconomic and/or budgetary forecasts:
*Assessment of macroeconomic and/or budgetary forecasts, please specify:

9.2 Remarks/ feedback concerning the questionnaire:
Meta Information
Creation date
Oreation date
Last update date
* Identifier of the questionnaire (please do not change this field):