

## EBRI Databook on Employee Benefits

### Chapter 18: Federal Government Retirement Plans

UPDATED FEBRUARY 2006

**Table 18.1a**

**Federal Public Pension Plan Participants**

*Summary of Selected Federal Public-Sector Participation Trends, Selected Years 1980–1993<sup>a</sup>*

	1980	1981	1982	1983	1984	1985	1986	1987	1988	1989	1990	1991	1992	1993
	(thousands)													
<b>Total Participants</b>	8,009	6,408	8,212	8,321	8,440	8,591	8,695	9,849	10,264	10,644	10,735	10,919	10,860	10,779
Defined Benefit Plans	8,009	6,408	8,212	8,321	8,440	8,591	8,695	8,860	8,947	9,190	9,110	9,143	8,960	8,743
Civil Service Retirement System	4,629	4,756	4,704	4,754	4,821	4,919	4,970	4,295	4,261	4,332	4,167	4,086	4,014	3,808
Federal Employees Retirement System	b	b	b	b	b	b	b	800	924	1,086	1,180	1,325	1,367	1,764
Military Service Retirement System <sup>c</sup>	3,380	3,377	3,508	3,567	3,619	3,672	3,725	3,765	3,762	3,790	3,763	3,732	3,579	3,511
Defined Contribution Plans	d	d	d	d	d	d	d	989	1,317	1,454	1,625	1,776	1,900	2,036
Thrift Savings Plan	d	d	d	d	d	d	d	989	1,317	1,454	1,625	1,776	1,900	2,036
Defined Contribution as a Percentage of Total	0%	0%	0%	0%	0%	0%	0%	10%	13%	14%	15%	16%	18%	19%
<b>Total Active Participants</b>	4,750	3,043	4,777	4,838	4,920	4,992	5,019	6,056	6,225	6,448	6,511	6,643	6,098	6,418
Defined Benefit Plans	4,750	3,043	4,777	4,838	4,920	4,992	5,019	5,109	5,126	5,158	5,092	5,050	4,798	4,606
Civil Service Retirement System	2,700	2,755	2,660	2,690	2,750	2,800	2,800	2,080	2,011	1,918	1,826	1,726	1,654	1,525
Federal Employees Retirement System	b	b	b	b	b	b	b	800	919	1,052	1,136	1,260	1,276	1,318
Military Service Retirement System <sup>c</sup>	2,050	2,088	2,117	2,148	2,170	2,192	2,219	2,229	2,196	2,188	2,130	2,064	1,868	1,763
Defined Contribution Plans	d	d	d	d	d	d	d	947	1,099	1,290	1,419	1,593	1,300	1,812
Thrift Savings Plan	d	d	d	d	d	d	d	947	1,099	1,290	1,418	1,593	1,300	1,812
Defined Contribution as a Percentage of Total	0%	0%	0%	0%	0%	0%	0%	16%	18%	20%	22%	24%	21%	28%

Source: U.S. Department of Defense, Office of the Actuary, *DOD Statistical Report on the Military Retirement System, Fiscal Years 1981–1993* (U.S. Department of Defense, n.d.); *Valuation of the Military Retirement System, Fiscal Years 1981–1993* (U.S. Department of Defense, n.d.); U.S. Office of Personnel Management, *Civil Service Retirement and Disability Fund Annual Report, Fiscal Years 1986–1993* (Washington, DC: U.S. Office of Personnel Management, n.d.); *U.S. Civil Service Retirement System Annual Report, Fiscal Years 1983–1985* (Washington, DC: U.S. Office of Personnel Management, n.d.), and unpublished data from the Office of Personnel Management, the Federal Retirement Thrift Investment Board, and the Department of Defense, Office of the Actuary.

<sup>a</sup>Data for the Civil Service Retirement System, Federal Employees' Retirement System, Military and Service Retirement System are expressed in fiscal years, beginning on October 1 of prior calendar year and concluding on September 30 of calendar year indicated. Data for the Thrift Savings Plan are expressed in calendar years.

<sup>b</sup>The Federal Employees Retirement System was established June 6, 1986.

<sup>c</sup>Includes all personnel and their families with the exception of reserves.

<sup>d</sup>The Thrift Savings Plan was established April 1, 1987.

UPDATED JULY 2010

**Table 18.1b**

**Federal Public Pension Plan Participants**

*Summary of Selected Federal Public-Sector Participation Trends, Selected Years 1994–2008<sup>a</sup>*

	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008
	(thousands)														
<b>Total Participants</b>	11,142	10,825	10,904	10,867	10,848	11,015	11,088	11,239	11,673	11,930	12,084	12,290	12,428	12,645	12,879
Defined Benefit Plans	9,023	8,630	8,650	8,564	8,548	8,615	8,588	8,639	8,673	8,730	8,684	8,690	8,728	8,745	8,879
Civil Service Retirement System	3,808	3,731	3,663	3,518	3,423	3,362	3,256	3,286	3,201	3,133	3,035	2,958	2,878	2,789	2,650
Federal Employees Retirement System	1,764	1,512	1,615	1,679	1,757	1,879	1,935	1,935	2,019	2,140	2,104	2,196	2,290	2,371	2,572
Military Service Retirement System <sup>b</sup>	3,451	3,387	3,372	3,367	3,368	3,374	3,397	3,418	3,453	3,457	3,545	3,536	3,560	3,585	3,657
Defined Contribution Plans	2,119	2,195	2,254	2,303	2,300	2,400	2,500	2,600	3,000	3,200	3,400	3,600	3,700	3,900	4,000
Thrift Savings Plan	2,119	2,195	2,254	2,303	2,300	2,400	2,500	2,600	3,000	3,200	3,400	3,600	3,700	3,900	4,000
Defined Contribution as a Percentage of Total	19%	20%	21%	21%	21%	22%	23%	23%	26%	27%	28%	29%	30%	31%	31%
<b>Total Active Participants</b>	6,360	6,345	6,302	6,188	5,905	6,020	5,983	5,984	6,388	6,530	6,650	6,919	6,707	6,684	6,833
Defined Benefit Plans	4,484	4,415	4,315	4,177	4,105	4,120	4,083	4,084	4,088	4,130	4,150	4,119	4,107	4,084	4,133
Civil Service Retirement System	1,443	1,525	1,343	1,189	1,099	1,042	978	978	906	854	788	722	650	580	477
Federal Employees Retirement System	1,375	1,318	1,447	1,497	1,547	1,640	1,668	1,668	1,717	1,808	1,882	1,952	2,014	2,066	2,195
Military Service Retirement System <sup>b</sup>	1,666	1,572	1,525	1,491	1,459	1,438	1,437	1,438	1,465	1,468	1,480	1,445	1,443	1,438	1,461
Defined Contribution Plans	1,876	1,930	1,987	2,011	1,800	1,900	1,900	1,900	2,300	2,400	2,500	2,800	2,600	2,600	2,700
Thrift Savings Plan	1,876	1,930	1,987	2,011	1,800	1,900	1,900	1,900	2,300	2,400	2,500	2,800	2,600	2,600	2,700
Defined Contribution as a Percentage of Total	30%	30%	32%	32%	31%	32%	32%	32%	36%	37%	38%	40%	39%	39%	40%

Source: U.S. Department of Defense, Office of the Actuary, *DOD Statistical Report on the Military Retirement System, Fiscal Years 1994–2005* (U.S. Department of Defense, n.d.); *Valuation of the Military Retirement System, Fiscal Years 1994-2006* (U.S. Department of Defense, n.d.); U.S. Office of Personnel Management, *Civil Service Retirement and Disability Fund Annual Report, Fiscal Years 1994–1999 and 2004-2006* (Washington, DC: U.S. Office of Personnel Management, n.d.); *Civil Service Retirement and Disability Fund Actuarial Valuations, Fiscal Year 2001* (Washington, DC: U.S. Office of Personnel Management, 2003); *Federal Civilian Benefits Programs Annual Report, Fiscal Year 2002-2003* (Washington, DC: U.S. Office of Personnel Management, 2003-2004); Office of Personnel Management, the Federal Retirement Thrift Investment Board, *Financial Statements of the Thrift Savings Investment Fund, 2002-2006*; and unpublished data from the Office of Personnel Management, the Federal Retirement Thrift Investment Board.

<sup>a</sup>Data for the Civil Service Retirement System, Federal Employees' Retirement System, Military and Service Retirement System are expressed in fiscal years, beginning on October 1 of prior calendar year and concluding on September 30 of calendar year indicated. Data for the Thrift Savings Plan are expressed in calendar years.

<sup>b</sup>Includes all personnel and their families with the exception of reserves.

UPDATED FEBRUARY 2011

**Table 18.1c**

**Federal Public Pension Plan Participants**

*Summary of Selected Federal Public-Sector Participation Trends, Selected Years 2009<sup>a</sup>*

	2009
	(thousands)
<b>Total Participants</b>	13,299
Defined Benefit Plans	8,999
Civil Service Retirement System	2,575
Federal Employees Retirement System	2,748
Military Service Retirement System <sup>b</sup>	3,676
Defined Contribution Plans	
Thrift Savings Plan	4,300
Defined Contribution as a Percentage of Total	32%
<b>Total Active Participants</b>	7,036
Defined Benefit Plans	4,236
Civil Service Retirement System	426
Federal Employees Retirement System	2,330
Military Service Retirement System <sup>b</sup>	1,480
Defined Contribution Plans	
Thrift Savings Plan	2,800
Defined Contribution as a Percentage of Total	40%

Source: U.S. Department of Defense, Office of the Actuary, *DOD Statistical Report on the Military Retirement System, Fiscal Years 2009* (U.S. Department of Defense, n.d.); *Valuation of the Military Retirement System, Fiscal Years 2009* (U.S. Department of Defense, n.d.); U.S. Office of Personnel Management, *Civil Service Retirement and Disability Fund Annual Report, Fiscal Years 2010* (Washington, DC: U.S. Office of Personnel Management, n.d.); Office of Personnel Management, the Federal Retirement Thrift Investment Board, *Financial Statements of the Thrift Savings Investment Fund, 2009*.

<sup>a</sup>Data for the Civil Service Retirement System, Federal Employees' Retirement System, Military and Service Retirement System are expressed in fiscal years, beginning on October 1 of prior calendar year and concluding on September 30 of calendar year indicated. Data for the Thrift Savings Plan are expressed in calendar years.

<sup>b</sup>Includes all personnel and their families with the exception of reserves.

UPDATED FEBRUARY 2006

**Table 18.2a**

**Federal Government Retirement Plan Financial Trends**

*Summary of Federal Plan Trends, Selected Years 1979–1993<sup>a</sup>*

	1979	1980	1981	1982	1983	1984	1985	1986	1987	1988	1989	1990	1991	1992	1993
	(\$ billions)														
<b>Total Assets</b>	\$64	\$73	\$83	\$96	\$110	\$125	\$154	\$186	\$219	\$262	\$289	\$326	\$366	\$411	\$465
Defined benefit plans	64	73	83	96	110	125	154	186	218	260	284	318	355	394	434
Civil Service Retirement System	64	73	83	96	110	125	142	161	175	198	204	220	237	256	277
Federal Employees' Retirement System	b	b	b	b	b	b	b	b	4	8	12	18	24	32	41
Military Service Retirement System	c	c	c	c	c	c	12	25	39	53	68	80	94	106	116
Defined contribution plans	d	d	d	d	d	d	d	d	1	3	5	8	11	16	21
Thrift Savings Plan	d	d	d	d	d	d	d	d	1	3	5	8	11	16	21
Defined contribution plans as a percentage of total	0%	0%	0%	0%	0%	0%	0%	0%	0.4%	1.1%	1.7%	2.5%	3.0%	3.9%	4.5%
<b>Total Contributions</b>	16	19	22	24	25	25	54	56	55	59	60	61	65	68	68
Defined benefit plans	16	19	22	24	25	25	54	56	55	57	58	59	62	64	63
Civil Service Retirement System	16	19	22	24	25	25	27	28	24	25	26	28	29	30	31
Federal Employees Retirement System	b	b	b	b	b	b	b	b	2	3	4	4	5	6	6
Military Service Retirement System	c	c	c	c	c	c	27	28	29	29	28	27	28	28	26
Defined contribution plans	d	d	d	d	d	d	d	d	1	2	2	2	3	4	5
Thrift Savings Plan	d	d	d	d	d	d	d	d	1	2	2	2	3	4	5
Defined contribution plans as a percentage of total	0%	0%	0%	0%	0%	0%	0%	0%	1.8%	3.4%	3.3%	3.3%	4.6%	5.9%	7.4%
<b>Total Benefit Payments</b>	23	27	32	35	37	38	39	42	44	47	50	53	56	58	63
Defined benefit plans	23	27	32	35	37	38	39	42	44	47	50	53	56	58	62
Civil Service Retirement System	13	15	18	30	21	22	23	25	26	28	30	31	33	33	35
Federal Employees Retirement System	b	b	b	b	b	b	b	b	e	e	e	e	e	e	e
Military Service Retirement System	10	12	14	15	16	16	16	18	18	19	20	22	23	25	27
Defined contribution plans	d	d	d	d	d	d	d	d	e	e	e	e	e	e	1
Thrift Savings Plan	d	d	d	d	d	d	d	d	e	e	e	e	e	e	1
Defined contribution plans as a percentage of total	0%	0%	0%	0%	0%	0%	0%	0%	e	e	e	e	e	e	0.8%

Source: U.S. Department of Defense, Office of the Actuary, *DOD Statistical Report on the Military Retirement System, Fiscal Years 1981–1993* (U.S. Department of Defense, n.d.); U.S. Office of Personnel Management, *Civil Service Retirement and Disability Fund Annual Report, Fiscal Years 1986–1993* (Washington, DC: U.S. Office of Personnel Management, n.d.); *U.S. Civil Service Retirement System Annual Report, Fiscal Years 1983–1985* (Washington, DC: U.S. Office of Personnel Management, n.d.), and unpublished data from the Office of Personnel Management, the Federal Retirement Thrift Investment Board, and the Department of Defense, Office of the Actuary.

<sup>a</sup>Data for the Civil Service Retirement System, Federal Employees' Retirement System and Military Service Retirement System are expressed in fiscal years. Data for the Thrift Savings Plan are expressed in calendar years.

<sup>b</sup>The Federal Employees' Retirement System was established June 6, 1986.

<sup>c</sup>The Military Service Retirement System was not funded until October 1, 1984.

<sup>d</sup>The Thrift Savings Plan was established April 1, 1987.

<sup>e</sup>Less than \$0.5 billion or less than 0.5 percent.

UPDATED JULY 2010

## Table 18.2b

### Federal Government Retirement Plan Financial Trends

#### Summary of Federal Plan Trends, Selected Years 1994–2008<sup>a</sup>

	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008
	(\$ billions)														
<b>Total Assets</b>	\$494	\$537	\$581	\$631	\$685	\$738	\$783	\$818	\$858	\$920	\$977	\$1,037	\$1,110	\$1,156	\$1,190
Defined benefit plans	468	502	534	570	608	643	685	717	756	791	825	864	903	924	987
Civil Service Retirement System	294	311	329	344	361	376	395	404	417	425	433	438	442	426	423
Federal Employees' Retirement System	50	60	70	83	97	111	127	144	162	183	204	228	253	280	311
Military Service Retirement System	124	131	135	143	150	156	163	169	177	183	188	198	208	218	253
Defined contribution plans	26	35	47	61	77	95	98	101	102	129	152	173	207	232	203
Thrift Savings Plan	26	35	47	61	77	95	98	101	102	129	152	173	207	232	203
Defined contribution plans as a percentage of total	5.3%	6.5%	8.1%	9.7%	11.2%	12.9%	12.5%	12.3%	11.9%	14.0%	15.6%	16.7%	18.6%	20.0%	17.1%
<b>Total Contributions</b>	67	67	67	73	74	75	78	80	86	86	95	105	109	117	141
Defined benefit plans	62	61	61	66	66	67	69	70	74	72	79	86	89	96	119
Civil Service Retirement System	31	31	32	33	33	33	33	33	34	29	34	33	35	36	35
Federal Employees Retirement System	6	6	7	7	7	8	9	9	10	11	13	15	15	17	19
Military Service Retirement System	25	24	22	26	26	26	27	28	30	32	32	38	39	43	65
Defined contribution plans	5	6	6	7	8	8	9	10	12	14	16	19	20	21	22
Thrift Savings Plan	5	6	6	7	8	8	9	10	12	14	16	19	20	21	22
Defined contribution plans as a percentage of total	7.5%	9.0%	9.0%	9.6%	10.8%	10.7%	11.5%	12.5%	14.0%	16.3%	16.8%	18.1%	18.3%	17.9%	15.6%
<b>Total Benefit Payments</b>	65	68	70	73	76	78	81	84	86	89	93	99	106	120	120
Defined benefit plans	64	67	69	72	74	76	78	81	84	86	89	94	99	122	112
Civil Service Retirement System	36	38	39	41	42	43	44	46	47	48	50	52	55	57	59
Federal Employees Retirement System	<sup>b</sup>	1	1	1	1	1	1	1	2	2	2	3	3	4	4
Military Service Retirement System	28	28	29	30	31	32	33	34	35	36	37	39	41	43	49
Defined contribution plans	1	1	1	1	2	2	3	3	2	3	4	5	7	8	8
Thrift Savings Plan	1	1	1	1	2	2	3	3	2	3	4	5	7	8	8
Defined contribution plans as a percentage of total	1.5%	1.5%	1.4%	1.4%	2.6%	2.6%	3.7%	3.6%	2.3%	3.4%	4.3%	5.1%	6.6%	6.2%	6.7%

Source: U.S. Department of Defense, Office of the Actuary, *DOD Statistical Report on the Military Retirement System, Fiscal Years 1994–2007* (U.S. Department of Defense, n.d.); U.S. Office of Personnel Management, *Civil Service Retirement and Disability Fund Annual Report, Fiscal Year 2007* (Washington, DC: U.S. Office of Personnel Management, 2008.); Office of Personnel Management, the Federal Retirement Thrift Investment Board, *Financial Statements of the Thrift Savings Investment Fund, 2002-2007*; and unpublished data from the Office of Personnel Management, the Federal Retirement Thrift Investment Board.

<sup>a</sup>Data for the Civil Service Retirement System, Federal Employees' Retirement System and Military Service Retirement System are expressed in fiscal years. Data for the Thrift Savings Plan are expressed in calendar years.

<sup>b</sup>Less than \$0.5 billion.

UPDATED JANUARY 2011

## Table 18.2c

### Federal Government Retirement Plan Financial Trends

#### Summary of Federal Plan Trends, Selected Years 2009<sup>a</sup>

	2009	
		(\$ billions)
<b>Total Assets</b>	\$1,292	
Defined benefit plans	1,048	
Civil Service Retirement System	422	
Federal Employees' Retirement System	348	
Military Service Retirement System	278	
Defined contribution plans	244	
Thrift Savings Plan	244	
Defined contribution plans as a percentage of total	18.8%	
<b>Total Contributions</b>	148	
Defined benefit plans	125	
Civil Service Retirement System	36	
Federal Employees Retirement System	20	
Military Service Retirement System	69	
Defined contribution plans	23	
Thrift Savings Plan	23	
Defined contribution plans as a percentage of total	15.5%	
<b>Total Benefit Payments</b>	124	
Defined benefit plans	117	
Civil Service Retirement System	63	
Federal Employees Retirement System	5	
Military Service Retirement System	49	
Defined contribution plans	7	
Thrift Savings Plan	7	
Defined contribution plans as a		

percentage of total

5.6%

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Source: U.S. Department of Defense, Office of the Actuary, *DOD Statistical Report on the Military Retirement System, Fiscal Years 2009* (U.S. Department of Defense, n.d.); U.S. Office of Personnel Management, *Civil Service Retirement and Disability Fund Annual Report, Fiscal Year 2009* (Washington, DC: U.S. Office of Personnel Management, 2010.); Office of Personnel Management, the Federal Retirement Thrift Investment Board, *Financial Statements of the Thrift Savings Investment Fund, 2009*; and unpublished data from the Office of Personnel Management, the Federal Retirement Thrift Investment Board.

<sup>a</sup>Data for the Civil Service Retirement System, Federal Employees' Retirement System and Military Service Retirement System are expressed in fiscal years. Data for the Thrift Savings Plan are expressed in calendar years.

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### **Other EBRI Research on Federal Government Retirement Plans Benefits – Updated August 2011**

[July 2011 Issue Brief, "Twenty-Five Years After Federal Pension Reform"](#)

So how has federal pension reform fared, 25 years later? Did the legislation accomplish the purposes that Senator Stevens (R-AK) set out for it? In light of today's focus on reining in the federal budget (including cutting entitlement programs), and with many states examining their own retirement systems, it is instructive to review the process of federal pension reform a quarter-century ago in order to see how the current system was created and what governors and state legislators might learn from the experience as they confront a number of the same issues faced by the Congress in 1986.