

Memorandum of Understanding

On Preparing the

Survey of Health, Ageing and Retirement in Europe (SHARE)

Preamble

Desiring to further strengthen Europe's position in research in the world, and to intensify scientific co-operation across disciplinary and national boundaries;

Recognizing that turning the challenges of population ageing into chances for the European citizens is a top priority for Europe as expressed in many statements by the European Union and its member states;

Referring to a communication by the European Commission to the European Council and the European Parliament (2000) which identifies population ageing and its social and economic challenges to growth and prosperity to be among the most pressing challenges of the 21st century in Europe, which points out serious infrastructure gaps in understanding individual and population ageing, and which then calls to “*examine the possibility of establishing, in co-operation with Member States, a European Longitudinal Ageing Survey*“ in order to foster European research on ageing;

Building on the current prototype of a Survey of Health, Ageing and Retirement in Europe (SHARE) which has been selected by the ESFRI roadmap process to be upgraded as one of the central research infrastructures of the European Research Area;

Recognizing that this new interdisciplinary, international, and longitudinal survey with unprecedented quality regarding coherence, breadth and international comparability will in the future be of great significance in many different fields of fundamental and applied sciences such as demography, economics, epidemiology, gerontology, biology, medicine, psychology, public health, health policy, sociology and statistics;

Recognizing that evidence-based public policy making requires an up-to-date data infrastructure;

The undersigning countries have come together in order to express, without making a legal commitment, their interest in participating in the Survey of Health, Ageing and Retirement in Europe.

Article 1
Establishment of a SHARE-ERIC

- (1) There shall be a distributed European Research Infrastructure called the Survey of Health, Ageing and Retirement in Europe European Research Infrastructure (hereafter referred to as “SHARE-ERIC”).
- (2) SHARE-ERIC shall apply to be conveyed the legal form of a European Research Infrastructure Consortium (ERIC) under the Council regulation 10603/09.
- (3) The initial headquarter of SHARE-ERIC shall be in Mannheim, Germany.

Article 2
Tasks

- (1) SHARE-ERIC shall provide a distributed infrastructure of micro data necessary to understand individual and societal ageing (hereinafter referred to as “the Survey”). Its main tasks are:
 - (a) to *design a core survey instrument* which captures the essential information on the economic, health, and family/social conditions of life of individuals age 50 and older and their spouses;
 - (b) to *administer this survey instrument* every two years to a panel of respondents in each participating country and to maintain contact to all panel members between panel waves;
 - (c) to assemble the collected information in a *user-friendly data base* accessible to all scientific researchers subject to applicable data confidentiality restrictions and to maintain this data base including basic data cleaning, imputation, and documentation.
- (2) The Survey shall cover three phases:
 - a) During Phase I SHARE-ERIC shall conduct an initial full-scale survey wave in years 2010 and 2011 based on the design developed in the preparatory phase.
 - b) During Phase II SHARE-ERIC shall conduct three additional full-scale survey waves in years 2012/13, 2014/15 and 2016/17, update the design to maintain state-of-the-art, and disseminate the data.
 - c) Upon successful scientific evaluation, SHARE-ERIC shall conduct during Phase III another three full-scale survey waves in years 2018/19, 2020/21 and 2022/23, update the design to maintain state-of-the-art, and disseminate the data.

Article 3
Principles

- (1) SHARE shall be designed by researchers for researchers. Excellence in research is paramount to all other considerations, including the accession to SHARE-ERIC. The scientific excellence of SHARE shall be monitored by an independent Scientific Monitoring Committee.
- (2) SHARE shall be a supranational survey. Cross-national comparability shall govern all design decisions. Topics with supranational research potential shall have priority over topics applicable to single countries.

(3) SHARE shall integrate economics, health, and social sciences. Topics with interdisciplinary research potential shall have priority over topics applicable to single disciplines.

(4) SHARE shall be a longitudinal survey, following individuals as they age. Topics with longitudinal research potential shall have priority over topics applicable to single points in time.

(5) Research based on SHARE shall facilitate fact-based EU policies, such as the open method of coordination and the Lisbon agenda, to help meeting the challenges of population ageing in all countries of the EU.

**Article 4
Steering Committee**

(1) The work in preparing SHARE-ERIC shall be coordinated by a Steering Committee, consisting of one representative for each signatory of this Memorandum of Understanding. The representatives are appointed by the signing bodies.

**Article 5
Contributions**

(1) Each undersigning party declares that it will support a national scientific partner institution in finding the resources to cover the country’s share of the construction and operating costs.

(2) The headquarter country according to Article 1 shall carry the expenses of the staff associated with those central tasks that take place in that country.

**Article 6
Changes and Language**

(1) Changes of this Memorandum of Understanding have to be agreed upon in writing by all undersigning parties.

(2) This Memorandum of Understanding is done in English language only, in as many copies as there are parties, each of them equally valid.

Signature:

For
Country
Institution

Date:
Place:

Name
Position