

ANNUAL ACTIVITY REPORT
2018/19





SHARE-ERIC

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*How we age
in Europe.*

SHARE'S MISSION

SHARE, the Survey of Health, Ageing and Retirement in Europe, seeks to analyse the process of population ageing in depth.

It is the first study to examine the different ways in which people aged 50 and older live in 27 European countries and Israel.

Its scientific potential lies in the extensive data gathered from more than 140,000 individuals (approximately 380,000 interviews) all across Europe, covering the interplay between economic, health and social factors in shaping older people's living conditions.

SHARE findings have a strong socio-economic impact as they support evidence-based policies on the national as well as on the European and international level.

FOREWORD FROM THE CHAIR

In my capacity as new Chair of SHARE-ERIC, I have the pleasure to welcome you to its 7th Annual Activity Report. I have taken over the Chairmanship from Dr. Angelika Willms-Herget in May 2018, who resigned after seven years of heading the Council. I would like to take the opportunity to thank her for having successfully accompanied SHARE-ERIC from its early days until now, including a very positive external evaluation in 2017.

2018 was a turbulent year for SHARE. After huge efforts to stick to the original schedule and to prepare the eighth survey wave in the 28 SHARE countries in a timely manner, some operations had to be paused as SHARE was partly running out of funding. As a consequence, SHARE Wave 8 needed to be postponed by one year, which has negative effects on the whole schedule, as SHARE-ERIC intends to provide released data of ten survey waves by 2024.

This situation is in particular unsatisfying for countries with own funding and respective timelines, e.g. set by the use of structural funds. These countries would like to start on time while other countries are lagging behind. The scientific value for SHARE, also from the perspective of the better-off countries, lies however precisely in the simultaneous collection of data in all 28 countries.

This challenging experience made it evident that the European coverage of SHARE cannot be financed in a reliable way based on the existing funding mechanism, as already revealed by the European Commission. In its Sustainability Report, the Commission stated in view of SHARE-ERIC: “RI (research infrastructures), contributing to EU policymaking, currently lack a specific type of EU support”.¹ In order to steer SHARE into calmer waters in the future, SHARE-ERIC has appealed to the European Commission and the Member States asking for the introduction of a new type of funding geared towards the needs of European coverage of social science panel studies. We would already now like to thank those actors who have shown great understanding and the willingness to start concrete actions for this attempt with the view on the new Framework Programme Horizon Europe. Let’s write another chapter of SHARE’s success story together!




Dr. Klaus Schindel
SHARE-ERIC Chair

¹ SUSTAINABLE European Research Infrastructures – A call for action – SWD (2017) 323 final

FOREWORD FROM THE MANAGING DIRECTOR

“European Coverage” is indeed a difficult aim to achieve in times of Brexit and so many other frictions in the European Union. As long as SHARE pursues European coverage, it will be a mirror of the state of the European Union with similar frictions, financial difficulties and nerve-wrecking last-minute decisions.

We should not forget, however, that SHARE – very much like the European Union itself – has a stable core, common aims, and the willingness to solve problems, even if in the very last minute. SHARE has been extremely successful in creating a better understanding of the implications of population aging for individuals and society by comparing countries with different demographic structures, very different pension and health care systems, different mentalities and preferences. SHARE is a hugely successful observatory of the current and future challenges serving research in a very broad set of disciplines such as demography, economics, epidemiology, gerontology, medicine, psychology, public health, and sociology, often with concrete implications for EU and national policies. The success of SHARE is documented in a new part of this Annual Activity Report, called “SHARE in Numbers” which presents a few key performance indicators.

Much of SHARE’s success is hard to measure in simple numbers and ratios. Concrete implications for EU and national policies encompass – just to take a few examples – better policies to prevent old-age poverty, better portability of pensions, broader and deeper healthcare. SHARE has contributed to these examples of policy improvements through its scientific policy analyses, through contributions to Commission publications such as the Pension Adequacy Report, and through participation in policy advisory boards where evidence from SHARE can be brought to the fore.

SHARE’s great success that has been achieved in spite of the many small and large obstacles to complete European coverage rests on many shoulders: our faithful respondents, the many scientists involved in SHARE, and our – well, by now 65 different – funders, including national ministries, research councils, academies and other national funders, plus the US National Institute on Aging and the European Commission. We are grateful to all of them.




Prof. Axel Börsch-Supan, Ph.D.
Managing Director of SHARE-ERIC

WHAT IS SHARE?

Introducing the Survey of Health, Ageing and Retirement in Europe

Population ageing is one of Europe's most pressing problems in the 21st century. In order to meet its manifold challenges, scientific research is needed. SHARE, the Survey of Health, Ageing and Retirement in Europe, was created to deliver the data to conduct this research. In 2004, SHARE started interviewing people of the generation 50+. Since then, the same people have been interviewed every two years. As of Wave 7, the latest wave of data collection, SHARE has conducted around 380,000 interviews with 140,000 respondents. Specially trained interviewers collect the data on the participants' economic, social and health situation in computer-assisted personal interviews. This data is complemented by large-scale objective physical measures, such as grip strength, lung function and chair stand.

Research on a Global Scale

SHARE operates in all continental Member States of the European Union as well as in Switzerland and Israel. Strictly harmonised questionnaires guarantee cross-national comparability. SHARE is also embedded in a global network of sister studies, thus allowing comparative research on a truly global scale.

Exploiting Europe's "Natural Laboratory"

With the help of SHARE data, researchers can provide a better understanding of how individuals and

families are affected by ageing. The survey exploits Europe's institutional, economic, social and cultural diversity as a "natural laboratory" to investigate the population ageing process, bringing together many scientific disciplines, including demography, economics, epidemiology, psychology, sociology, medicine, biology and statistics. SHARE also offers several special data sets. These include retrospective data on the respondents' entire life course, the linkage of survey data with institutional pension information, or a simplified dataset for training and teaching purposes. The data are available to all researchers around the globe free of charge.

Becoming the First ERIC

SHARE has become a major pillar of the European Research Area, selected as one of the projects to be implemented by the European Strategy Forum on Research Infrastructures (ESFRI) in 2006, given a new legal status as the first ever European Research Infrastructure Consortium (SHARE-ERIC) in March 2011, and becoming an ESFRI landmark in 2016.



Central Coordination

SHARE is centrally led by the Managing Director of SHARE-ERIC, Professor Axel Börsch-Supan, Ph.D., at the Munich Center for the Economics of Aging, a division of the Max Planck Institute for Social Law and Social Policy. About 30 people work in the SHARE central office in Munich, taking care of the Database Management, Survey Methodology, Operations, and the various research projects of SHARE. They are complemented by the Financial Affairs and European Relations units, which are responsible for the administrative aspects of the survey, such as funding, governance, central procurement for the survey agencies, data protection and public relations.

Area Coordination

SHARE's multidisciplinary nature is reflected in the coordination of the questionnaire's various research fields. Professor Guglielmo Weber, Ph.D., (University of Padua, Italy) is the coordinator for the Income & Wealth section, Karen Andersen-Ranberg, Ph.D., (University of Southern Denmark) for Health, Professor Florence Jusot (Université Paris-Dauphine,

France) for Health Care, Professor Agar Brugiavini, Ph.D., (Ca' Foscari University of Venice, Italy) for Work & Retirement and Professor Howard Litwin, Ph.D., (Hebrew University of Jerusalem, Israel) for Social Networks.

Software Infrastructure

The software tools used by SHARE are provided by CentERdata, a research institute located on the Tilburg University campus. CentERdata not only programs the questionnaires, but also provides the software infrastructure for SHARE as well as the online data access for users.

Country Teams

In each participating country, a country team manages the national or regional data collection. Scientists from local research institutions lead a team of one to five members and ensure the same methodological standards in all SHARE countries. To conduct the survey, carefully selected survey agencies assist these teams with their professional knowhow and their highly trained interviewers.

SCIENTIFIC ASPECTS

SHARE'S COMMITMENT

The SHARE infrastructure is based on the trust of its respondents during and beyond the survey waves. The protection of the personal data of the survey participants is a matter of the utmost priority for SHARE and non-negotiable. SHARE promises to the participants that the data will not be used for anything but scientific purposes. Any other uses, such as a commercial use of the data, are therefore excluded as matter of principle.

AT A GLANCE

Overview of the Scientific Achievements in 2018

- **Data Collection and Release Preparations:** SHARE has successfully conducted its seventh survey wave. The release of the data is scheduled for spring 2019 and will enable researchers to analyse data from 140,000 individuals collected in about 380,000 interviews. (pp. 16-17)
- **Data Quality Assessment in SHARE:** SHARE has continued to push for the achievement of the same standards in all participating countries by establishing a common legal, scientific and data quality framework to which all survey agencies have to adhere. SHARE publicly documents compliance profiles and retention rates. (pp. 18-19)
- **Accelerometry:** SHARE will add to its objective measures by collecting physical activity data using accelerometers. This measure will allow to validate self-reported physical activity across countries, to examine the differences in activity between retired and working panel members, and to study how physical activity and sitting time are related to health outcomes during ageing. The collection of accelerometer data was tested during the Wave 8 pretest in summer 2018 to optimise the fieldwork design and logistics. (pp. 20-21)
- **Software Innovations:** SHARE has updated its questionnaire software to Blaise 5. Moreover, the design, the concept and the functionality of the Sample Management System (used by interviewers to document contact attempts and household composition) was updated as well and received a new name: Case Control. The Sample Distributor (used by survey agencies to organise the sample) was changed to a web-based platform and renamed to Sample Control. (pp. 22-23)
- **Schedule:** SHARE has put a new schedule in place to accommodate to the funding situation. Training for the field rehearsal will take place in late March 2019, going to the field immediately after that until May 2019. The main data collection for Wave 8 is planned to start in autumn 2019 and end in June 2020. (p. 23)
- **Train-the-Trainer (TTT):** In preparation of the Wave 8 pretest, SHARE has again successfully implemented its highly appreciated TTT concept. The TTT conveys all technical, logistical and managerial aspects of successful fieldwork and, even more importantly, provides hands-on experience. (p. 24)
- **User Support:** SHARE supports its users through the provision of ready-to-be-used variables, special (training) datasets, constantly updated documentation files, and user workshops in all SHARE countries. Furthermore, SHARE offers a helpdesk to which users can send their questions. In 2018, the helpdesk answered ten user requests per week. (p. 25)
- **Data Releases:** SHARE has released two data updates with major improvements. They contained the latest state of data cleaning, harmonisation across waves as well as a considerable range of updates and innovations. The two releases of the main data were accompanied by release updates of easySHARE and SHARE-RV. (p. 26)
- **Data & Documentation Tool:** SHARE has developed a new web interface for browsing and searching the SHARE (meta)data. Researchers who plan to use SHARE data for the first time can now get an impression about content and case numbers before downloading the data. Combining the questionnaire level with the data level, one of the tool's main features creates the possibility to generate wave- and module-specific codebooks. (p. 27)
- **SHARE Users & Publications:** With about 1,400 new registrations in the last year, both the total number of registered SHARE users (8,800) as well as the annual new registrations have reached an all-time high. This is reflected in the number of publications based on SHARE data, which had risen to more than 2,300 by the end of 2018. With 176, an annual record number of articles in peer-reviewed journals was published. (pp. 28-47)



DATA COLLECTION AND RELEASE PREPARATIONS

Release of Wave 7 data is scheduled for spring 2019

Since 2004, SHARE has provided every other year longitudinal micro data on the changing health, economic and social living conditions of Europeans aged 50 and older. It is a unique database laying the foundations for empirical research on ageing through many disciplines, including epidemiology, gerontology, medicine, psychology, public health, demography, economics, sociology, and statistics. In its last wave, eight new countries (Bulgaria, Cyprus, Finland, Latvia, Lithuania, Malta, Romania, and Slovakia) have joined SHARE, now covering 27 European countries and Israel. In addition, SHARE is closely harmonised with several studies worldwide, most closely with the HRS (USA), ELSA (England) and TILDA (Ireland). The network of harmonised global ageing studies also includes four Asian countries (China, Korea, Japan, and India) and three Latin American countries (Mexico, Brazil and Argentina).

375,000 interviews from 140,000 respondents in 28 countries

To date, SHARE has in total collected seven waves of current living circumstances (2004, 2006, 2010, 2013, 2015, 2017) and of retrospective life histories

(SHARELIFE; 2008, 2017). Three additional waves are planned until 2024. With the forthcoming release of Wave 1 to 7 in Spring 2019, SHARE provides data which has been generated by more than 375,000 interviews (including main interviews as well as End-of-Life interviews) on about 140,000 respondents in 28 countries to the scientific community free of charge. A comprehensive overview of the conducted data is given in the SHARE “data resource profile”, which has been authored by the central coordination team and is published in the International Journal of Epidemiology (Börsch-Supan et al. 2013).

Survey participation in SHARE

Figure 1 provides an overview about the development of the number of successful interviews in all released samples over time and also includes preliminary data for Wave 7. Note that some countries missed one or more wave(s) due to specific circumstances. For example, Greece had dropped from SHARE in Wave 4 due to the economic crisis. Furthermore, Portugal and Hungary did not participate in Wave 5 after only having joined SHARE in Wave 4. Fortunately, Greece and Portugal could be recovered for participation in Wave

6, while Hungary returned in Wave 7 along with the eight new countries mentioned above.

Further information on both the participation of respondents in their first (baseline/refreshment) inter-

view as well as the longitudinal development of the survey so far are presented in the technical report “Survey Participation in the Survey of Health, Ageing and Retirement (SHARE)” that is updated with every data release and can be found on the SHARE website.

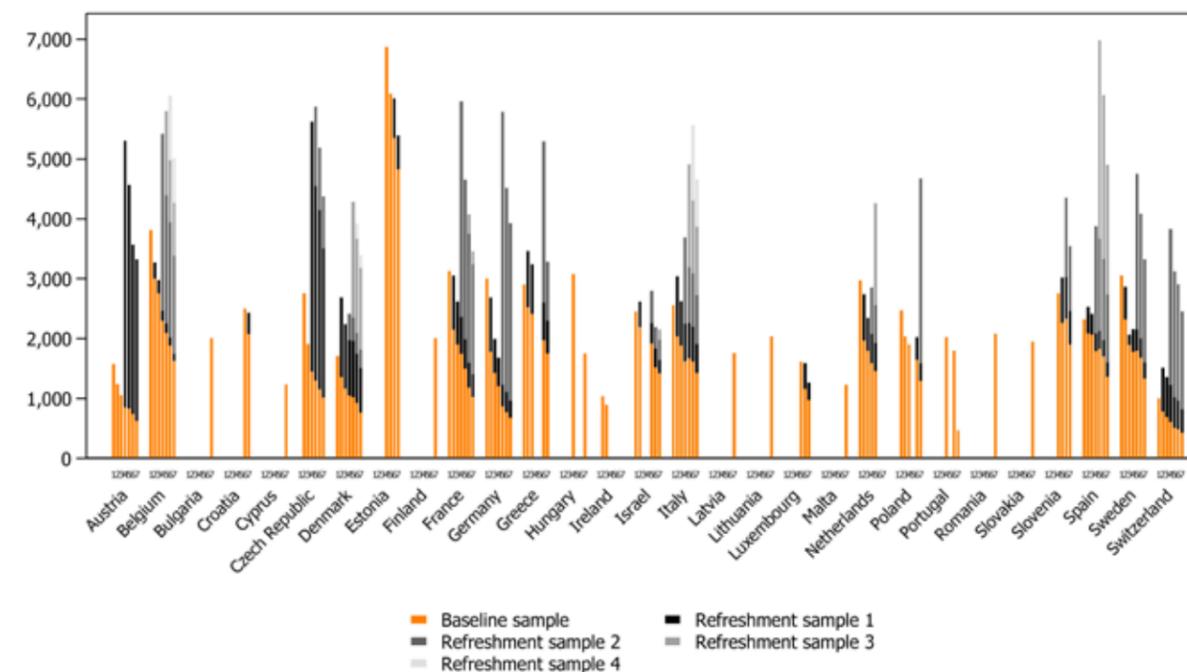


Figure 1: Overview of released samples in SHARE (including the forthcoming public release of March 2019)

¹ Available online: <https://doi.org/10.1093/ije/dyt088>.

DATA QUALITY ASSESSMENT IN SHARE

Indicators to measure data quality and representativeness in a cross-national survey

The SHARE Compliance Profiles

In order to maximise cross-national comparability, the Survey of Health, Ageing and Retirement in Europe (SHARE) applies an ex-ante harmonisation approach which goes beyond standardised questionnaire design. This includes the centrally programmed CAPI instrument, harmonisation of fieldwork procedures via centralised training sessions as well as centralised electronic instruments for contact data collection (CASE CTRL) and fieldwork management (SAMPLE CTRL). This approach has been chosen by SHARE for scientific reasons as it minimises artifacts in cross-national comparisons that are created by country-specific survey design. SHARE is currently conducted in 28 countries. While national operations in all participating countries are coordinated by university-based groups of researchers, the actual interviewing is - in most countries - subcontracted to commercial survey organisations. The latter have the expertise, staff capacities and logistics available to conduct such a large-scale complex panel study as SHARE. It is a major challenge to ensure proper implementation of ex-ante harmo-

nisation within such a decentralised environment. To this effect, SHARE employs three instruments: 1) the SHARE Model Contract which provides the legal framework for standards and quality control; 2) the SHARE Survey Specifications ("Appendix 1" of the Model Contract) which define the quality standards of the survey; and 3) the SHARE Compliance Profiles report assessing adherence to those standards ex-post. The first two instruments build the legal and scientific framework to be adopted by all participating countries without modifications whereas the compliance profiles serve as a quality assessment instrument. The SHARE Compliance Profiles report is based on a set of quality control indicators, such as timely data uploads, careful implementation of interviewer trainings, proper back checks of conducted interviews, high response rates, or a minimum number of contact attempts in households without an interview. All participating countries are evaluated on these indicators uniformly. The combination of ex-ante specifications and ex-post Compliance Profiles levels the playing field for all participating countries and allows for a fair comparison of national survey quality.

Survey participation and representativeness in SHARE

In addition to the compliance profiles that report how SHARE quality standards were adhered to in Wave 7, further information on both the participation of respondents in their first (baseline/refreshment) interview as well as the longitudinal development of the survey so far are presented in the technical report "Survey Participation in the Survey of Health, Ageing and Retirement (SHARE)". This report is updated with every data release and describes how many households and individuals of the initial gross sample delivered completed interviews, how many were found to be ineligible, and how many did not respond. Survey participation patterns are presented separately for baseline and refreshment samples as well as longitudinal samples for countries that have already participated in SHARE before. Whereas in the context of baseline and refreshment samples the focus is on response behavior towards the initial survey request, for the longitudinal samples the focus is on response behavior in subsequent waves, i.e. on panel retention. Especially the latter is of utmost

importance to exploit the full potential of SHARE regarding longitudinal analyses. Only if persons can be observed repeatedly as time passes by, it is possible to understand individual ageing processes and to learn how respondents adapt to the changing environment over time. Taken together, the compliance profiles and the report on survey participation provide users of SHARE with the information needed to evaluate their results and conclusions in terms of representativeness and quality of the data.



¹ Malter, F.; Schuller, K. and Börsch-Supan, A. (2018). SHARE Compliance Profiles – Wave 7. Munich: MEA, Max Planck Institute for Social Law and Social Policy. Can be downloaded here: <http://www.share-project.org/data-documentation/methodology-volumes.html>.

² Bergmann, M.; Kneip, T.; De Luca, G.; Scherpenzeel, A. (2017). Survey Participation in the Survey of Health, Ageing and Retirement (SHARE), Wave 1-6. Based on Release 6.0.0 (March 2017). SHARE Working Paper Series 31-2017. Munich: SHARE-ERIC. Can be downloaded here: <http://www.share-project.org/data-documentation/sample.html>.

ACCELEROMETRY

Expanding the range of objective physical measures in SHARE

One key area covered by SHARE is health – an area that large-scale surveys usually measure through self-report questions. Such self-reports, however, insufficiently account for interpersonal and intercultural variation because different respondents can interpret the same response categories differently. Therefore, SHARE has, since its outset in 2004, combined self-reported health with objective health measurements in form of physical performance measurements, such as grip strength, peak flow and chair stand measures. Such measures minimise variations in interpretation, facilitate the comparison across countries, and permit adjustments of self-reported measures of health.

Comparing self-reported and objectively observed health

One important element well-known to be correlated to an individual's health is activity. SHARE has so far been measuring activity by self-report items on the frequency of moderate respectively vigorous activity. In its eighth wave, however, SHARE will add to its objective measures by collecting physical activity data using accelerometers. The aim of this data collection is to 1) validate self-reported physical activity across countries; 2) to examine the differences in activity between retired and working panel members; and 3) to study how physical activity and sitting time are related to health outcomes during ageing, in particular by looking at mobility, falling risk, and obesity.

Testing accelerometer data in ten countries

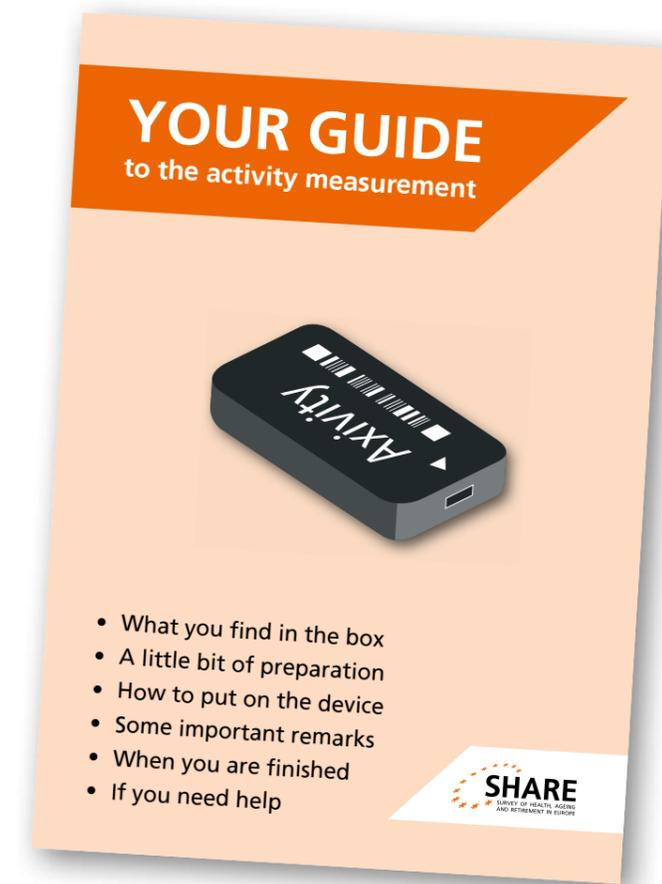
Accelerometer data will be collected in a subsample of ten SHARE countries, aiming to obtain full activity data from 200 respondents per country. In accordance with the ex-ante harmonised design of SHARE, the same devices, materials, fieldwork design and monitoring will be used in all ten countries in the accelerometer study. In a first step, this collection of accelerometer data was tested during SHARE's Wave 8 pretest in summer 2018 to test and optimise the fieldwork design and logistics, including the shipment of the accelerometers, self-administration by the respondents aged 50+, handling of the data at different survey agencies, and the linkage of the data to the Computer Assisted Personal Interview (CAPI) interview data.

Adjusting for the outcomes of the test

Survey agencies were explicitly asked to report any problems to us, even minor problems. Despite this request, most countries had no problems at all. Two countries reported shipment problems for which feasible solutions will be tested in the next test round, such as courier delivery instead of normal post. An unexpected finding of the pretest was that some devices had not registered any data. Checking and testing of these devices showed that they had not been properly initialised before

sending them to the respondents. Lesson learned from this finding is that Train-the-Trainer sessions of the next test round will include a detailed training for the survey agencies how to correctly initialise the devices. In addition, we produced a video instruction showing this procedure step by step, which can be used to refresh the training during fieldwork. Finally, the pretest served to study the

reasons for not willing to participate in the study, in order to develop suitable measures to increase respondent consent in the main study. The main refusal reason reported by the interviewers in the CAPI questionnaire was that respondents expected it would be too burdensome. Therefore, we will develop a better explanation and illustration of the non-intrusiveness and size of the device.



Brochure instructing respondents how to handle the accelerometer

SOFTWARE INNOVATIONS

Updating the software package, Sample Management System and Sample Distributor

An exceptional challenge in the preparation of Wave 8 was the instrument development in the questionnaire software. Since the start of SHARE in 2004, all questionnaire tools have been developed in software package Blaise 4. This version is now outdated, has no tablet compatibility and is difficult to integrate with new software. In addition, its support ended in early 2019. Therefore, we changed to Blaise 5 in Wave 8, which is also used by developers of the American Health and Retirement Study to generate their Computer Assisted Personal Interview. The software change required that the questionnaire and the interfaces with the sample management, translation management and data extraction tools were revamped.

Switching to Case Control and Sample Control

Moreover, the design, the concept and the functionality of the Sample Management System (SMS), which is used by interviewers to document contact attempts and household composition, was changed and received a new name: Case Control. In addition, the Sample Distributor (SD), which is used by survey agencies to organise the sample, was changed to a web-based platform and renamed to Sample Control.

Consequently, before the regular questionnaire testing by the country teams could start, the basic instrument itself had to be tested repetitively at the developer level and in-house at SHARE Cen-

tral. This was also followed by additional levels of “early testing” by two volunteer country teams (Israel and Belgium) to resolve issues with the software upgrade that were observable only at the national level after translation.

Testing the New Implementations

Due to this modernisation of the software for Wave 8, the SHARE Central team in cooperation with the German survey agency Kantar, decided to carry out a “pre-pretest”. The goal of this first test run in just one country was to detect any major technical issues with the implementation and installation of new software in the field. The actual pretest of Wave 8 took place in June 2018.

Both the pre-pretest and the pretest showed that the new Case Control (formerly SMS) was in a very good condition already and that the new design was accepted by the survey institutes and interviewers as well. The same applies to the questionnaire. However, the transition to the new web-based Sample Control (formerly SD) was associated with a significant additional effort not only for the software developers and SHARE Central but also for the survey agencies who had to upgrade some of their hardware for it to be compatible with the new instrument.

CentERdata

CentERdata is an eminent research institute, located at the Tilburg University campus in the

Netherlands. It is responsible for the technical implementation of the questionnaire as well as the development and maintenance of the SHARE survey software. This includes the distributed case management system, tools to support the translation process, various lookup databases and hosting the SHARE infrastructure for the data collection, data delivery and data dissemination.



SCHEDULE AND PREPARATIONS OF WAVE 8

Evaluation of pretest and preparation for field rehearsal

Due to the uncertainties and restricted financing of SHARE, all operative work to prepare Wave 8 was delayed until funding was solid again. Consequently, a new schedule was needed to take this delay as well as the restrictions into account that (1) some countries are obligated to spend national funds for Wave 8 by the end of 2019 and (2) Wave 10 should be finished by 2024.

While the conceptual development of the Wave 8 questionnaire had already started in 2016, most of 2017 and the first half of 2018 were dedicated to

the technical and conceptual update of the software to current standards. From May to June 2018, the survey instrument was translated, adapted and released in all countries. The pretest took place in July and August 2018. From August to October 2018, the pretest results were evaluated, translation refined and software issues fixed. According to the schedule, training for the field rehearsal will take place in late March 2019, going to the field immediately after that and ending in May 2019. The main data collection for Wave 8 is planned to start in autumn 2019 and end in June 2020 (see Table 1).

2018												2019												2020											
1	2	3	4	5	6	7	8	9	10	11	12	1	2	3	4	5	6	7	8	9	10	11	12	1	2	3	4	5	6	7	8	9	10	11	12
					Pretest												Field Rehearsal																		

Table 1: Schedule of Wave 8

TRAIN THE TRAINER

Hands-on training for successful fieldwork

The fieldwork of the pretest for Wave 8 had to be conducted between the end of June and the end of August 2018. Similar to the preceding waves, each survey agency was instructed to draw a random test sample of about 100 individuals. In preparation of the Wave 8 pretest, SHARE has again successfully implemented its highly appreciated Train-the-Trainer (TTT) concept, in which all technical, logistical and managerial aspects of successful fieldwork were conveyed and, even more importantly, trained with hands-on experience. The audience of the TTT consists of representatives of each Survey Agency who are asked to replicate the contents of the TTT during National Training Sessions where the interviewers are trained.

Two Separate Sessions

SHARE held two separate TTT sessions in order to keep the intensive teaching style manageable (i.e. avoiding overly crowded training sessions of 100+

attendees). The sessions lasted two days each and took place in Munich in 2018. To properly prepare all countries for the pretest of Wave 8, we put great emphasis on multi-modal teaching methods that ensure training of standardised best practices of interviewing (such as active listening and being prepared to deal with respondent reluctance) at the national level.

Stronger Focus on Hands-on Training

The main difference to the TTT sessions that were conducted for the test runs in 2016 was an even stronger focus on hands-on training of the completely revised and modernised software. This ranged from contacting a household and obtaining information about the household composition to conducting the actual interview. In addition, we invited experts of all areas to respond to item-specific questions during the mock interview.



USER SUPPORT

Helping SHARE users to handle the data

SHARE supports its users in various respects. First, certain variables are provided in a ready-to-be-used state (the so-called generated variables) to assure an easy and fast entry into cross-national data and high convenience while working with the SHARE data. Second, the special datasets easySHARE and the Job Episodes Panel are provided to the scientific community. easySHARE was generated and is constantly updated with every new release of the SHARE main data. While the main release of SHARE is stored in many single data files, easySHARE stores information on all respondents and of all currently released data collection waves in a single long-format dataset tailor-made for student training, and for researchers who have little experience in quantitative analyses of complex survey data. The Job Episodes Panel is

based on information of the third wave of SHARE (SHARELIFE). It comes in the form of a retrospective long panel and contains the labor market status of each SHARELIFE respondent throughout her/his life. The dataset can be complemented by information about institutions, public policies and macroeconomic conditions individuals are confronted with in the course of their lives in order to study life-cycle processes and the accumulative effect of important events. Third, SHARE offers a large set of constantly updated documentation files helping researchers working with the data. In addition, SHARE provides tailored user support by answering user questions via email (info@share-project.org). In 2018, the SHARE user support answered on average around 10 data-related user questions each week.

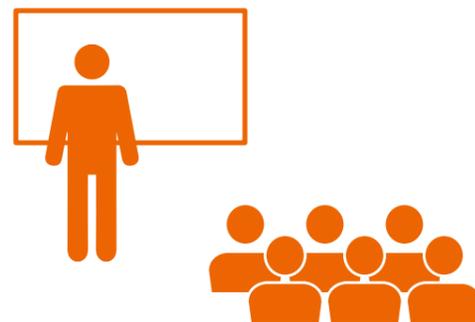


CONFERENCES & USER WORKSHOPS

Staying in close contact with the users

SHARE puts a lot of effort into staying in close contact with the international user community in order to learn about their on-going research by answering user requests via email, being present at international conferences, and organising regular user workshops. SHARE was part of a booth organised by the German Research Foundation (DFG) at the XIX ISA World Congress of Sociology in Toronto, Canada. A SHARE-RV conference took place in Berlin where participants were introduced into the possibilities of analysing data that links the SHARE survey data with administrative records of the German Pension Fund. In Vienna, SHARE and the European Social Survey hosted their first user con-

ference together. Furthermore, two national user workshops took place: the country team of Luxembourg organised a national SHARE user workshop and the Finnish country team gave a workshop on sequence analysis using SHARE data.



NEW DATA RELEASES

Release 6.1.0 and 6.1.1

Containing some major improvements, release 6.1.0 of waves 1 to 6 was published in March 2018. It comprised the latest state of data cleaning, harmonisation across waves as well as a considerable range of updates and innovations. The coding for children's country of residence could be added to the CH module of Waves 1 and 2. Furthermore, the Wave 6 drop-off data for Switzerland was added as well as some additional cases to the Czech drop-off data of Wave 6. Minor changes and updates were

included in the CAPI modules of Waves 4 and 6 as well as in the generated variable modules. Moreover, the sample was improved by conducting thorough consistency checks based on information from all six waves. Release 6.1.1 was published in June 2018 containing an update of the generated variables module on educational attainment (gv_iscd) and some minor changes in Wave 3 (SHARELIFE). The two releases of the main data were accompanied by release updates of easySHARE and SHARE-RV.

THE SHARE DATA & DOCUMENTATION TOOL

New web interface for browsing and searching the SHARE (meta)data

For longitudinal survey data to be successfully used in secondary analysis, a comprehensive and accessible documentation of the data and metadata is necessary. In order to facilitate the use of its data, SHARE provides a set of different documentation files to the research community: the SHARE Data Resource Profile published in the International Journal of Epidemiology, the SHARE Release Guide containing general information on the database as well as wave-specific innovations, the Methodology Volumes describing methodological aspects and advancements, the Scales and Multi-Item Indicators Manual, and a constantly updated FAQ section on the website.

The new SHARE Data & Documentation Tool adds to the already existing comprehensive documentation material. This web application developed by CentERdata, an institute for data collection and research, in cooperation with SHARE Central at MEA is intended to be a fast, customisable, easy-to-use web interface for browsing and searching the SHARE (meta)data. Researchers who plan to use SHARE data for the first time can

get an impression about content and case numbers before downloading the data. Combining the questionnaire level with the data level, one of the main features of the SHARE Data & Documentation Tool creates the possibility to generate wave- and module-specific codebooks. The tool was released in November 2018 and is available at

www.share-datadocutool.org.



SHARE USERS IN EUROPE

Number of users per country



CONSTANTLY ON THE RISE

The number of users and annual registrations reached a new high

By the end of 2018, SHARE had more than 8,800 officially registered data users from all over the world (Fig. 1). With around 1,400 new registrations in the last year, both the total number of registered SHARE users as well as the annual new registrations have reached an all-time high. Numbers that emphasise the importance of SHARE and its data: Ageing in all its dimensions needs to be studied over time and beyond national borders. SHARE's international comparability is reflected in the diverse origin of its users who benefit from

the study's international data. This data becomes even more valuable when combined with the harmonised datasets of SHARE's international sister studies, like ELSA in England or HRS in the USA. It is therefore not surprising that - with 618 registered users - the USA rank as the country with the highest number of SHARE users outside of Europe. The country with the highest number of registered users remains Germany with 1,830, followed by the United Kingdom with 809 and the Netherlands with 806 registered users.

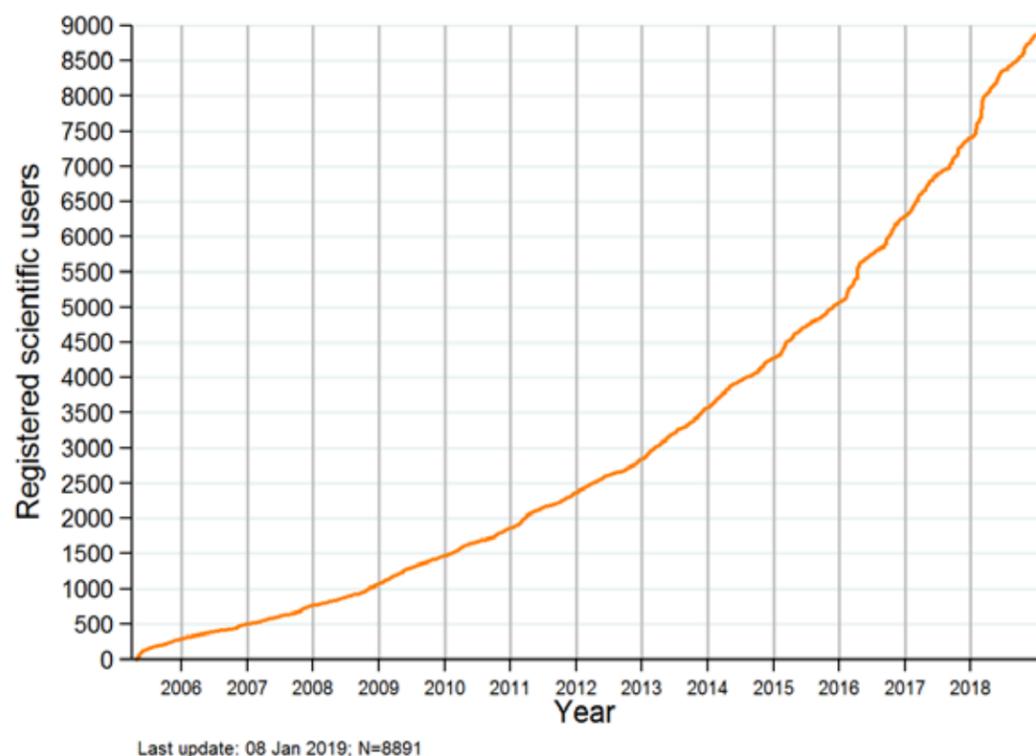


Figure 1: SHARE data users

SCIENTIFIC IMPACT

The number of SHARE publications continues to rise

SHARE's scientific impact continues to grow – not only in terms of data users but also in terms of publications based on this data. By the end of 2018, SHARE had inspired 2,329 publications from a broad range of disciplines. The majority of publications were articles in peer-reviewed scientific journals, including about 670 Social Science Citation Index ranked articles. With 176, the annual number of articles in peer-reviewed journals has reached an all-time high. It has to be noted that the reported numbers are limited to those publications that are known to SHARE Central. Researchers working publishing with SHARE data are required to report their publications to SHARE. Unfortunately, however, this is not always the case even though we regularly encourage all users to report new publications by means of newsletters, e-mails, and our

website. Literature research frequently finds unreported publications, meaning the reported number of publications is probably an underestimate.

An overview of all SHARE based publications is available on our website:

www.share-project.org/share-publications.html

A selection of some the most recent publications is given later in this report. The selection includes all English language publications in refereed journals. Many additional publications have appeared in edited volumes or were written in other languages. It provides a good impression of the diversity of the inter- and multi-disciplinary research that has become possible through SHARE data.

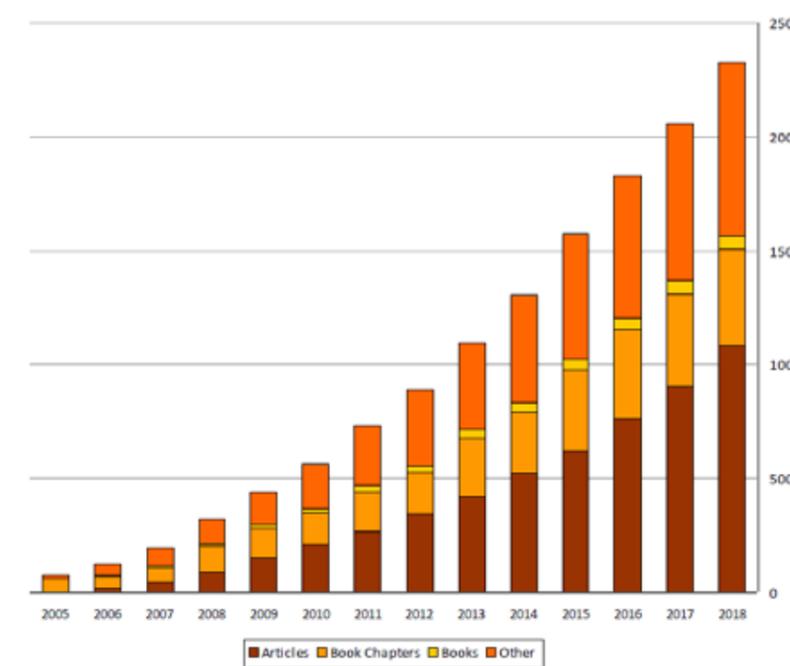


Figure 2: Publications Based on SHARE Data by Year

SHARE USERS

ALL OVER THE WORLD



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“ I am impressed by the achievements and substantial efforts invested in SHARE, especially by the wide European coverage of the survey and data collected. Its value is not only crucial for the scientific community and policy-making at EU level, but also for decision-makers at national level. ”

Jean-Eric Paquet, Director-General – Directorate “Research and Innovation”, European Commission

PO LICY IMP ACT

With its broad data on the economic, social and health situation of European citizens, SHARE enables policymakers to tackle the challenges of population ageing with the help of scientific evidence.

POLICY IMPACT

Evidence-based policymaking with SHARE

In 2011, the European Commission identified population ageing as one of the most pressing challenges of Europe in the 21st century. In order to respond to its economic, social and health consequences with evidence-based policymaking, an up-to-date data infrastructure was needed. SHARE filled this role, becoming the first ever European Research Infrastructure Consortium. Since its initial setup, the survey has supplied policy makers with

reliable and comparable data to base their decisions on. In 2018, SHARE has been a valuable resource for a wide variety of policy analyses again – from a municipal project to increase senior citizen's quality of life to the definition of the EU's grand economic and social priorities for the upcoming year. We have selected some examples to illustrate the contribution of SHARE to local, national, European and global evidence-based policymaking.

“[The Survey of Health, Ageing and Retirement in Europe] collects detailed data on many aspects of the lives of participants aged 50 and over in several Member States and has been an invaluable resource for understanding the health needs of ageing populations.”

The European Commission Expert Panel on Effective Ways of Investing in Health

ON THE LOCAL LEVEL

Tel Aviv-Yafo Municipality

For Tel Aviv-Yafo – as for other European cities, regions and countries – senior citizens pose a big challenge since they are a rapidly growing age group and loneliness is a big risk for them. For this reason, the city chose to focus on improving their older inhabitants' quality of life. Tel Aviv-Yafo already operated many social and cultural activity services for older people, but the percentage of those who these services did not reach remained high. Therefore, before creating new services or scaling existing ones, the city decided to conduct research to understand the specific needs and to develop solutions which are best suited to answer the different challenges. Its innovation team, thus, conducted in-depth qualitative research, interviewing the senior population, stakeholders and experts. To reaffirm their results with quantitative research on factors associated with quality of life, they used SHARE data. The results of their research will be used to deduct practical solutions for the improvement of its senior populations' quality of life.

ON THE NATIONAL LEVEL

Switzerland



The Swiss Health Observatory (Obsan) examines the target achievement of the two national strategies “addiction” and “noncommunicable diseases” on behalf of the Swiss Federal Office of Public Health. Its strategic goals are evaluated with the help of a set of indicators. SHARE data is analysed to develop an indicator on multimorbidity of people aged 50 and over.

Finland



Despite recent efforts to equalise the treatment of men and women in the pension system design in many countries, the gender gap in pensions persists. This gap contributes to old-age income inequality in Europe and beyond. The Finnish Centre for Pensions (ETK), therefore, hosted a high-profile seminar on Gender Inequalities in Employment and Pensions in May 2018. The ETK is the central body of the statutory earnings-related pension scheme in Finland. Anna Rotkirch, SHARE Country Team Leader for Finland, was among the panelists who were completed by representatives of the Central Organization of Finnish Trade Unions, Finnish Centre for Pensions and political parties. All international keynote speakers used SHARE data as their main data source, highlighting the value of SHARE data for pension policies as well as the evident need for Finnish SHARE data which will first be released with Wave 7 in 2019.

ON THE EUROPEAN LEVEL

Directorate-General for Employment, Social Affairs and Inclusion

Pension Adequacy Report

DG Employment used SHARE data for the 2018 edition of its Pension Adequacy Report. The report is published every three years and is a key document on Member States' pension policies, focusing on the adequacy of old-age incomes today and in the future. Besides the regular analysis of old-age incomes and pension policies, the 2018 report for

the first time also focuses in detail on the opportunities for people in different types of employment and self-employment to acquire adequate pension rights. For this reason, it report employs SHARE data to analyse pensions and retirement conditions for the self-employed and those in non-standard employment compared to retired employees. Furthermore, the data is used to shed light onto gender gaps in pension coverage, coverage of supplementary pensions across the EU, and older workers who report pressure or physical effort in their job. SHARE's Director, Prof. Axel Börsch-Supan, PhD, also attended the report's release event as an expert speaker, discussing pension rights for different types of employment with national and European policymakers.

Indicators Sub-Group

As life expectancy is rising, more people now reach an age where declining health makes them dependent from others. Consequently, long-term care expenditures are rising quickly. Currently, mostly female family members provide long-term care. Yet, as fewer children are born, the number of caregivers is expected to decline. Social protection systems will, thus, increasingly need to provide for those in need but currently only a few EU Member States have comprehensive social protection for long-term care. To monitor and, consequently, improve this policy field, the Indicators Sub-Group (ISG) of the Social Protection Committee is using SHARE data for the development of a portfolio of long-term care indicators. Melanie Wagner of the SHARE Operations team consulted the ISG members on the long-term care aspects of the data.

Directorate-General for Health and Food Safety

Expert Panel on Effective Ways of Investing in Health. Opinion on Benchmarking Access to Healthcare in the EU

The Directorate-General for Health and Food Safety has set up a multidisciplinary expert panel which provides the Commission with advice on effective ways of investing in health. Faced with growing evidence that some groups within EU Member States have been unable to achieve access to necessary healthcare, the EU has committed to action to reduce levels of unmet need. In response, the expert panel was requested to propose a series of benchmarks for assessing progress in reducing unmet need for healthcare. In their report, the experts point out that SHARE is an important benchmarking tool and “an invaluable resource for understanding the health needs of ageing populations”.¹

European Commission

Annual Growth Survey / Joint Employment Report

The European Commission and the Council draw on SHARE data for the Annual Growth Survey (AGS) 2019 and the accompanying draft Joint Employment Report. Marking the beginning of the European Semester, the AGS is the Commission's main tool for defining the EU's economic and social priorities for the upcoming year. Its main messages form the basis for the country-specific policy recommendations. Specifically, SHARE data is employed as a key indicator for “Guideline 8: Promoting equal opportunities for all, fostering social inclusion and combatting poverty”, where it helps to analyse the differences in terms of pension income, living standards and risk of poverty between the self-employed and regular employees.



ON THE GLOBAL LEVEL

OECD

High-Level Conference on Policies for Equal Ageing: A Life-Course Approach

At the High-Level Conference on Policies for Equal Ageing: A Life-Course Approach, SHARE Director, Prof. Axel Börsch-Supan, PhD, was invited as an expert speaker to discuss how older workers can participate in the labour market. Dr. Agnieszka Chlon-Dominczak, SHARE Country Team Leader for Poland, also appeared as a speaker.

What Do Wages Add to the Health-Employment Nexus? Evidence from Older European Workers

The OECD Directorate for Employment, Labour and Social Affairs has used SHARE data to analyse the effect of health on employment and hours worked and its indirect effect that is mediated through wages. The analysis of the SHARE data allows for

the conclusion that large direct effects of health on employment that were found imply an instrumental role for policy aimed at helping employers accommodate workers with health limitations so as to keep them on the job at older ages.

Northern Dimension

Northern Dimension Future Forum on Health: Healthy Ageing

The Northern Dimension is a joint policy of four equal partners: the European Union, the Russian Federation, Norway and Iceland. It aims at supporting stability, well-being and sustainable development in the region by means of practical cooperation. At the Northern Dimension Future Forum on Health: Healthy Ageing, Miika Mäki, SHARE Country Team Operator for Finland, was invited as the keynote speaker. Based on findings from SHARE, he discussed with the attending high-level policymakers how the challenges of population ageing can be transformed into opportunities.

¹ European Commission (2018). Benchmarking Access to Healthcare in the EU: Report of the Expert Panel on Effective Ways of Investing in Health. Luxembourg: Publications Office of the European Union.

OPERATIONAL ASPECTS

SHARE is grateful for the financial support received. We thank the European Commission, the German Federal Ministry of Education and Research, the Max Planck Society, and the US National Institute on Aging for financing the central coordination of SHARE.

We are thankful to national governments, research councils and foundations for funding the data collection in the member countries. We thank the EU Commission for the additional support of data collection in those countries that are facing financial challenges.

SHARE-ERIC COUNCIL MEETINGS

1. SHARE-ERIC Council in Munich

On 4th May 2018, the 9th SHARE-ERIC Council Meeting took place at the Max Planck Society in Munich.

In the meeting, Dr. Klaus Schindel was elected as new Chair after Angelika Willms-Herget had to resign, and Prof. Elsa Fornero was confirmed as Vice Chair. Croatia and Cyprus were welcomed into the ERIC as new accession countries. Furthermore, the requirements of the new general data protection regulation and its consequences for SHARE were presented by Heidi Schuster, the data protection officer of SHARE-ERIC. Moreover, the scientific activities of 2017 and the future plans for SHARE 28 were discussed as well as the amendment of the statutes, caused in particular by the introduction of a new body the SHARE-ERIC governance: the Assembly of Country Team Leaders whose Chair is also member of the Management Board.



9th SHARE-ERIC Council Meeting in Munich, Germany

“ The SHARE project is of crucial importance in the implementation of evidence-based policies regarding pension system reform, improving the efficiency of Croatian labor market institutions and the healthcare system. ”

Croatia – Ministry of Labour and Pension System

“ SHARE with its broad data on the economic, social and health situation of European citizens enables Cyprus policymakers to base difficult economic and social decisions on evidence, which will make them more targeted and effective. ”

Cyprus – Ministry of Labour, Welfare and Social Insurance

2. Extraordinary extended SHARE-ERIC Council in Frankfurt

On 17th December 2018, the 10th SHARE-ERIC Council took place as an extraordinary and extended meeting (also including SHARE countries that are not yet member of the ERIC). The convocation of that Council had become necessary after the unexpected negative result for the INFRADEV 3 call application. As an immediate measure to secure the continued operation of SHARE, the proposal by the Management Board to increase the membership fee and introduce a participation fee was adopted by the Council and the present other SHARE countries. It was decided to apply once more for the INFRADEV 3 call 2018-2019 (deadline 20/3/2019). Furthermore, the countries welcomed the initiative to propose to the European Commission and the Member States the introduction of a new kind of funding mechanism adapted to the special needs of social science panel surveys under the upcoming new framework programme Horizon Europe. As part of the regular Council activities, the Council accepted the request of Bulgaria to join the ERIC.

SCIENTIFIC MEETINGS IN 2018

SHARE researchers across Europe gather to discuss the project's progress



St. Julian's, Malta



Riga, Latvia

St. Julian's, Malta, 7-9 February 2018

It aimed at preparing the eight survey wave in terms of the schedule, translation of the questionnaire, sampling and accelerometry. Furthermore, the next book on the first results of Wave 7 was announced.

Scientific presentations focused on "Ethnic Networks, Business Cycles, and Disability Insurance Take-Up" and "Determinants of Inequalities in Health in Europe - with Focus on Retirement". In terms of organisational preparations, presentations were given concerning strategies on national funding, the central procurement process, supporting PR activities and data protection requirement under the new general data protection regulation.

Riga, Latvia, 5-7 September 2018

Its main areas of focus were the pretest findings of Wave 8 from different perspectives, such as the country teams, area coordinators and SHARE central. The authors of the First Results Book gave presentations on a wide array of topics:

- Personality and Childhood: Personality and Physical Health among Older Europeans
- Health Inequalities: How do Early Life Conditions Shape Health Age Profiles in Late Life?
- Labour Market and Retirement: Transition to Retirement and Conditions of Living of People with Full and Interrupted Labour Market Careers in their Life Course
- Societal Transition: Health Gap in Post-Socialist Central and Eastern Europe: A Life-Course Perspective
- Social Context, The Link to the Past and the Post-Communist Welfare State
- Family & Networks: Living Alone in Europe and Health Behaviours
- Health Care: Everyday Activity Limitations, Death and Social Networks of Older Europeans
- Objective Health: Life Expectancy and Health Investments
- "Bloody Research": End of Life and Palliative Care in Europe
- Blood Collection in the Field – Results and Lessons from the Polish Test Study

The Chair of the Scientific Monitoring Board, Arie Kapteyn, also contributed a presentation on "What They Say and What They Do: Comparing Physical Activity across U.S., England, and the Netherlands".

On the operational level, sampling, procurement, public relations, data protection, financial planning and structural funds were discussed. Furthermore, due to a new provision in the SHARE-ERIC statutes, a Chair of the Assembly of Country Team Leaders was elected for the first time. Czech Country Team Leader Radim Bohacek won the vote and, in his new role, became member of the management board.

SHARE PUBLIC RELATIONS

Communicating with the project's target group

SHARE explained in a 3-minute video

In November 2018, the Austrian Presidency of the EU Council Conference on Impact of Social Sciences and Humanities for a European Research Agenda took place in Vienna. For the conference, the organisers issued a call for videos, asking for impact stories resulting from SSH and arts-based research. SHARE took the opportunity to develop a video

that explains the survey's complex undertaking and highlights examples of its data on evidence-based policymaking. The video was submitted and on display at the conference. Furthermore, it was distributed on SHARE's web channels and greatly contributed to its online visibility, becoming SHARE's most successful social media post ever.



Watch the video here:
tiny.cc/SHARE_impact_film

The new SHARE Blog

In May 2018 a board of editors together with SHARE Central set up a new blog, covering research findings based on the Survey of Health, Ageing and Retirement in Europe. Every other week the blog's editors publish a new article based on a scientific publication using SHARE data in the fields of Ageing, Health, Social and Family Networks, Socio-Economic Status or Methodological and Statistical Advancements. Thereby, the blog encourages scientists from different fields to promote their SHARE based research on this open channel, discuss ideas and results with their colleagues and share their knowledge with a greater audience. The blog's editors carefully select and invite external authors to contribute on the blog with their research results. Their SHARE affiliations as well as scientific backgrounds enable the editors to ensure high scientific standards in every published post. SHARE-ERIC as-

sists the editors with hosting the blog, the editors, however, are independent researchers, whose expressed opinions in the blog posts do not necessarily reflect the opinion of SHARE-ERIC.

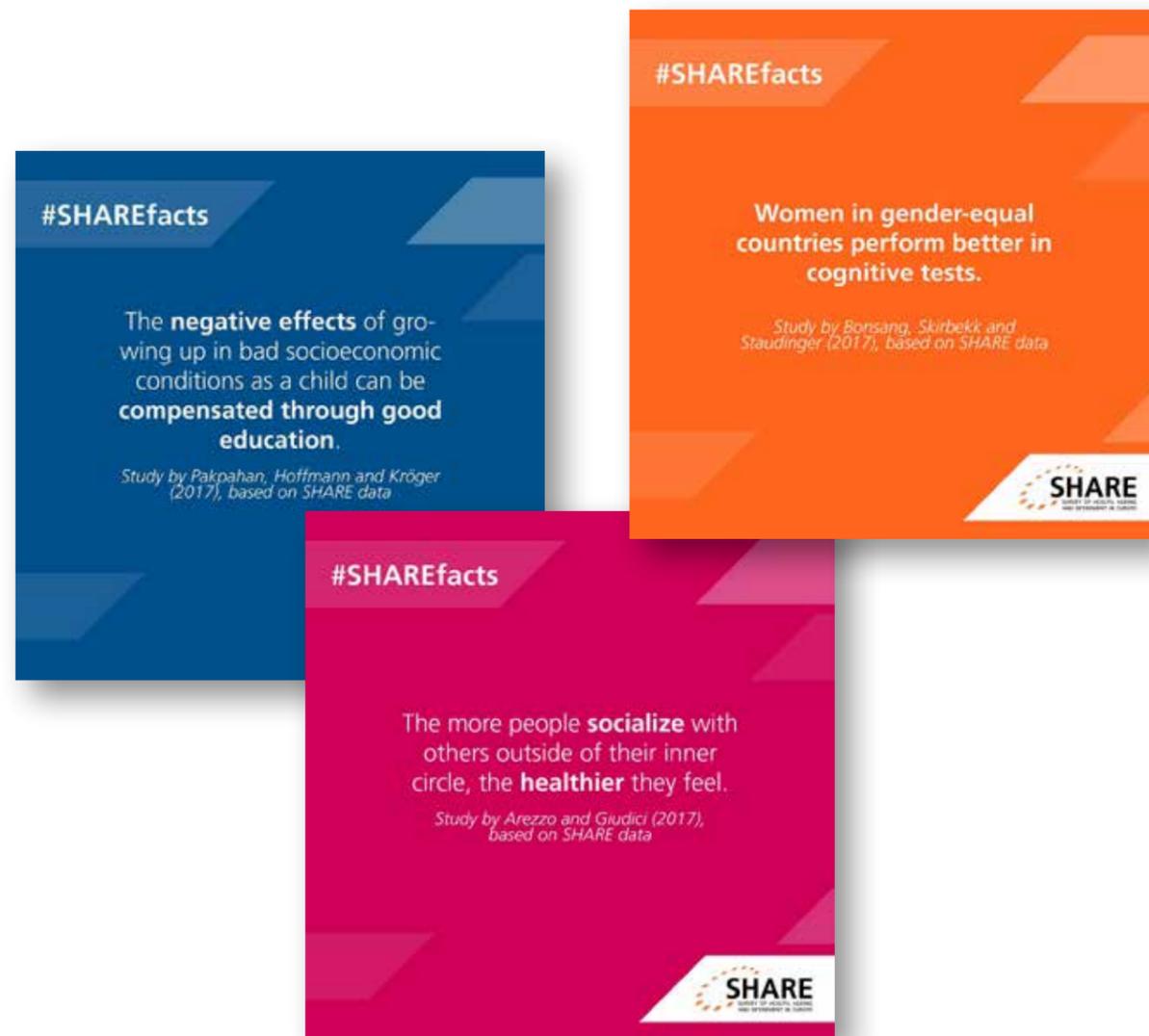
Find the new SHARE Blog online:
www.share-blog.eu



Securing visibility in social media

Social media are fast-paced. In order to secure visibility, SHARE developed a social media format tailored to this pace. The so-called #SHAREfacts inform about research with SHARE data by breaking it down into short take-home messages which are

approved by the authors of the respective studies. The messages are presented in the form of visual statements underlined by the strong corporate colours of SHARE that make the #SHAREfacts stand out in the newsfeed. The format as well as its name encourage interested followers to further share the messages among their own followers.



Maintaining Respondent Communication

SHARE would not be possible without its respondents. Their willingness to participate is absolutely pivotal and, accordingly, so is the communication with them. For this reason, SHARE has developed information about the upcoming wave. The panel respondents received a leaflet which informed them about the upcoming data collection and about what

has changed since the last wave. The new respondents received one which contained information on what to expect from participating in the survey. Finally, SHARE sent a 30-page brochure to all respondents. It gave insight into what the data is good for and presented results of SHARE-based research in a simplified wording. All materials were developed centrally and made available for all country teams for translation into the national languages.



ERIC FORUM

Bringing pan-European research infrastructures together



On its roadmap to become an effectively operating exchange platform in 2018, and potentially also a strategic forum, the ERIC Forum has taken further definitive steps in the past year:

During the second ERIC Forum meeting in Oxford, UK on the premises of INSTRUCT-ERIC on April 19 and 20, 2018 the Forum of now 20 ERICs adopted internal rules introducing a rotating Chairmanship and common PR measures for the first time. First Chair of the ERIC Forum has been Dr. Juan-Miguel González-Aranda, CTO of LifeWatch-ERIC.



mentation Project, financed by the EU Commission starting in January 2019, in the already existing ERIC Forum to obtain the maximum benefit of both.

An absolute novelty was a joint ERIC Forum and ERIC Committee meeting at the Forum meeting in Sevilla, for the first time bringing together representatives of the European Commission and the national Ministries with the ERIC Forum to discuss urgent operational issues of the ERICs.

The third ERIC Forum meeting took place in Seville, Spain from 27-28 November 2018 and was hosted by LifeWatch-ERIC. One main topic of the meeting was an intensive discussion about the question how to integrate the ERIC Forum Imple-



Next Chairs of the ERIC Forum are Ron Dekker, Director of CESSDA-ERIC and Sverre Quale, Director of ECCSEL-ERIC, both ERICs are based in Norway. The fourth ERIC Forum meeting will be held in Oslo, Norway on 7-8 May 2019.

Furthermore, the communication and managerial staff of SHARE-ERIC and fellow ERIC Forum member CERIC-ERIC met on 20-21 August 2018. The meeting continued the collaboration between the two research infrastructures which is based on their Memorandum of Understanding (MoU) signed on 25 October 2016 to strengthen scientific collaboration between the regions Friuli Ven-

ezia Giulia and Bavaria. Goal of the meeting was to exchange best practices and possible common actions in the fields of management, communications, monitoring and impact evaluation.



RITRAIN

The Research Infrastructure Training Programme continues to make progress



2018 was another successful year for the Rltrain project. During its 3rd Annual General Assembly in Prague from 25-26 September on the Campus of the Czech Academy of Sciences, the activities of the past year were discussed and necessary decisions taken. The External Advisory Board (EAB) of the project gave the following overall feedback:

“ The EAB members appreciate the high quality of the Master in terms of development, content and methodologies and again unanimously recognize the value of the work done. The programme has developed as scheduled and the dissemination of information by a variety of digital tools, particularly social media, enables a growing interest in the Master that is already quite visible in the statistics and reports. The training curricula is coherent and robust. It definitely responds to RIs and RI managers needs. The effort to keep the cost of the full master within a reasonable limit have been noted. As a whole, the EAB members are very satisfied with the accomplishments of the Rltrain work packages. Based on the feedback and achievements presented at the General Assembly, the EAB members have some suggestions to enhance the sustainability of the program. ”

Furthermore, the first EMMRI class is currently on its way to graduate, receiving their MBAs in spring of 2019. With a workshop on “Building Leadership in European Research Infrastructures. Common challenges, best practices and future perspectives of RI staff training” in Brussels, the Rltrain project is set to officially conclude in November of 2019. Rltrain will continue to offer its training services hereafter.



Module 6 – Business Development and Innovation in the RI context.

Photo Credit: University of Milano-Bicocca – Lorenzo Merignati



Module 4 – Sustainable Funding for European research infrastructures.

Photo Credit: University of Milano-Bicocca – Lorenzo Merignati

SHARE IN THE SERISS PROJECT

Exploiting synergies for Europe's research infrastructures in the social sciences

The Synergies for Europe's Research Infrastructures in the Social Sciences (SERISS) project aims to exploit synergies, foster collaboration and develop shared standards between Europe's social science infrastructures. This collaboration will help to better equip these infrastructures to play a major role in addressing Europe's grand societal challenges and to ensure that European policymaking is built on a solid base of the highest-quality socio-economic evidence. The project focuses on fostering strengths and overcoming weaknesses of social science infrastructures in three key ways:

- **Addressing key challenges for cross-national data collection** e.g. accurately representing the population, achieving equivalence through translation.
- **Breaking down barriers between social science infrastructures** via training and networking events and the development of shared online tools to facilitate harmonized data collection and documentation.
- **Embracing the future of the social sciences** by examining the legal and ethical challenges associated with new forms of data, developing a cross-national probability-based web survey and exploring automated coding for socio-economic variables.

SHARE is part of SERISS alongside several other research infrastructures and leads Work Package 2 "Representing the population" as well as Work Package 8 "A coding module for socio-economic survey questions". In addition, SHARE is involved in Work Packages 3 "Maximizing equivalence through translation", 4 "Interactive tools for cross-national surveys", 5 "Training and Dissemination", 6 "New forms of data: legal, ethical and quality matters", 7 "A survey future online? Constructing a cross-national probability based web panel system", and 8 "A coding module for socio-economic survey questions". In 2018, SHARE has worked in parallel on several tasks, including – to name only the most important ones – the production of a joint letter of request to improve the access to (person) registers for survey sampling, the implementation of a proven online collaboration platform, the application of language technologies and computational linguistic methods to survey translation, and a post-GDPR respondent information sheet (more information is available at <https://seriss.eu>). All these tasks combine the expertise of the largest European social surveys and draw on the experiences of involved country teams, leading to outcomes that benefit not only the studies involved but are of potential value also to other cross-national social surveys in Europe.



SOCIAL SCIENCES AND HUMANITIES OPEN CLOUD

Integrating the social sciences and humanities into the European Open Science Cloud

In 2018, SHARE joined the Social Sciences and Humanities Open Cloud (SSHOC) project. Beginning in 2019, SSHOC will realise the social sciences and humanities part of the European Open Science Cloud (EOSC) by offering access to research data and related services adapted to the needs of the SSH community. The aim is to facilitate the transition from the current landscape with disciplinary silos and separated e-infrastructure facilities into a fully-fledged cloud-based infrastructure. Thereby, it significantly contributes towards achieving the vision of the European Cloud Initiative and supports the implementation of European Open Science Cloud.

Making SSH data accessible across boundaries of individual repositories or institutions

SHARE is part of SSHOC alongside 46 other organisations: all SSH ESFRI Landmarks and Projects, relevant international SSH data infrastructures and the Association of European Research Libraries (LIBER) participate in the project, ensuring an inclusive approach. SSHOC will pool, harmonise and produce easy-to-use tools and services that will allow to process, enrich, analyse and compare the vast heterogeneous collections of SSH data available across the boundaries of individual repositories or institutions in Europe.

The project's expected main impacts are:

- The integration of SSH into the European Open

Science Cloud

- An EU-wide, easy-to-use SSH Open Marketplace, where tools and data are openly available
- EU-wide availability of high quality "cloud-ready" SSH tools and high-quality SSH data
- EU-wide availability of trusted and secure access mechanisms for SSH data, conforming to EU legal requirements
- Advancement of the state of the art through dedicated SSH data pilots cluster projects
- Establish data sharing as accepted practice (the "new normal") among the different SSH communities

SHARE as a work package leader

SHARE is leading Work Package 5 "Innovations in data access" in SSHOC, which aims to adapt the way in which social surveys commonly provide data access to scientific researchers, in response to developments in technology and EU policy. In particular, it identifies the following needs:

1. Surveys are increasingly using new data collection techniques, producing data that are very different in size and structure than the traditional data and demand a different approach of processing, storing and sharing this data.
2. Online data repositories are increasingly becoming a necessity for any project and institute, but technical resources at smaller institutes are often limited.

3. The new General Data Protection Regulation poses new demands and rules to data confidentiality which must be acknowledged in providing open data access.
4. More and more forms of sensitive data become available, and are being linked to traditional data. However, it is until now seldom possible to give open access to such sensitive or linked data.
5. In longitudinal and international research, data become over time very complex to extract and use for data users, especially when metadata and paradata are linked to it as well. The Work Package lead by SHARE addresses each of these needs and provides innovative solutions together with the partners in the different subtasks.

In addition to the lead in this work package, SHARE is involved in Work Packages 3 “Lifting Technologies and Services into the SSH Cloud”, 4 “Innovations in Data Production”. In these Work Packages, led by other partners in the project, SHARE participates in specific tasks to develop a historical job data base and to develop tools for the use of Computer Assisted Translation.



FINAN CIAL ASPE CTS

FINAN CIAL ASPE CTS

SHARE is fully financed by public funds, which are granted by national ministries / research councils, the European Commission or other public funders, such as foundations.

FINANCIAL ASPECTS

This section provides (a) the Financial Statement for SHARE-ERIC 2018 as required by Article 6 (8) of the SHARE-ERIC Statutes, (b) a statement of the funding in all SHARE member countries, and (c) the Financial Plan for 2019.

Financial Statement for SHARE-ERIC 2018

The accounting for the financial year 2018 could be closed mid-March 2019 with an audit report which found that all figures provided below (Figure 1) are in agreement with the bank accounts.

Summary		2018		
By expense/contribution type:				
Type	Code	Expenses	Contributions	Gain/Loss
INITIAL BALANCE				
CC: Country Contributions acc. to Art.9	CC	24.500,00	3.210.442,58	3.185.942,58
GC: Grants & contracts	GC	0,00	449.626,20	449.626,20
MF: Membership fees	MF	30.000,00	150.000,00	120.000,00
II: Interest income	II	0,00	344,92	344,92
VA: VAT reimbursement	VA	0,00	168.850,67	168.850,67
SV: Survey costs	SV	3.938.679,97	60,00	-3.938.619,97
PE: Personnel costs	PE	0,00	0,00	0,00
TV: Travel costs	TV	66.362,85	0,00	-66.362,85
MA: Materials costs	MA	9.921,21	8.062,28	-1.858,93
AC: Account and other charges	AC	722,58	0,00	-722,58
SC: Other subcontracts	SC	1.998.629,54	43.423,89	-1.955.205,65
CD: Column D	CD	0,00	0,00	0,00
XX: unknown, not yet categorized	XX	0,00	0,00	0,00
TOTAL FLOWS		6.068.816,15	4.030.810,54	-2.038.005,61
END BALANCE				2.628.845,89

Figure 1: Summary flow of funds in calendar year 2018

Figure 1 provides a summary of all account movements in 2018. It covers all countries which channeled funds through SHARE-ERIC and all SHARE-ERIC grant contributions and is structured by broad expense and contribution categories. Column 3 in Figure 1 shows the expenses paid in 2018. These include the final expenses for SHARE wave 7 and some first expenses on SHARE Wave 8. It also includes expenses for subcontracts including the costs of the SHARE country team at the national institution in some countries and the costs of the international coordination outside Munich.

Column 4 shows the contributions from member countries, including €150k membership fees, and grants received in 2018, and which finance these expenses.

The balance between expenses and contributions is shown in column 5. The positive balance is a reflection of the SHARE-ERIC bylaws which enforce that expenses can only be made if the corresponding contributions have been credited. The account balance (€2.6m) is due to country contributions as well as pre-financing grant amounts for Wave 8 which were already received in 2018 for payments in 2019.

Income	Amount
Membership fee 2018	
AT	10.000,00 €
BE	10.000,00 €
CY	10.000,00 €
CZ	10.000,00 €
DE	10.000,00 €
FR	10.000,00 €
GR	10.000,00 €
HR	10.000,00 €
HU	10.000,00 €
IL	10.000,00 €
IT	10.000,00 €
NL	10.000,00 €
PL	10.000,00 €
SE	10.000,00 €
SI	10.000,00 €
total income	150.000,00 €

EU-COM 2018	
SERISS	374.137,60 €
SHARE-DEV3	895.970,00 €
total income	1.270.107,60 €

Expenditure	Amount
ERIC administration 2018	
Account charges/transaction fees	678,03 €
Auditor	4.500,00 €
Budget SMB/Travel	38.106,28 €
0.5 FTE accountant	26.959,31 €
2 Council meetings	2.486,08 €
Travel to ERIC network/committee meeting	5.654,00 €
Other admin (domains)	1.505,66 €
Design and Print annual activity report	6.838,93 €
Data protection expert for agency checks	1.162,39 €
European Intellectual Property Office	525,00 €
total expenditures	88.415,68 €
Surplus/deficit	61.584,32 €

Int'l Coordination ex Munich, 2018	
IT support: CentERdata Tilburg	336.614,76 €
Economics Area: Padua	188.435,58 €
Economics Area: Venice	208.485,92 €
Health Area: Odense	174.296,34 €
Social Area: Jerusalem	134.919,66 €
Survey Mgmt/Methodology: Paris	78.655,00 €
Health Care Area: Wuppertal	78.425,00 €
SHARE-ERIC Admin: Madrid	70.275,34 €
total expenditures	1.270.107,60 €
Surplus/deficit	- €

Figure 2: Detailed flow of funds in calendar year 2018

Survey contribution 2018			Survey costs 2018	
Country	own	DG EMPL/SHAREDEV3	Country	Amount
AT	343.705,02 €		AT	273.705,02 €
BE* only partially, Wallonie	60.000,00 €		BE* only partially, Wallonie	60.000,00 €
CZ	145.750,00 €		CZ	145.750,00 €
DE - via DFGTU	938.440,00 €	- €	DE - via DFGTU	604.063,40 €
FR	158.858,58 €		FR	158.858,58 €
GR own/+ via SHAREDEV3	90.000,00 €	192.625,04 €	GR	192.625,04 €
IL*			IL*	
IT	290.000,00 €		IT	514.237,02 €
NL	438.660,00 €		NL	138.892,30 €
PL	151.800,00 €		PL	77.864,10 €
SE	148.174,98 €		SE	148.174,98 €
SI	146.520,00 €		SI	278.068,34 €
CH*			CH*	
BG via DG EMPL wave 7 + Part A wave 8		65.084,65 €	BG	65.084,65 €
CY own/+via DG EMPL wave 7 + Part A wave 8	63.000,00 €	14.282,88 €	CY	14.282,88 €
DK*			DK*	
EE* partially via SHAREDEV3		121.172,22 €	EE	140.922,65 €
ES own/+via SHAREDEV3 W7	200.000,00 €	128.819,24 €	ES	167.885,91 €
FI via DG EMPL wave 7 +Part A wave 8		294.096,72 €	FI	294.096,72 €
HR via SHAREDEV3 wave 7/own wave 8	146.784,00 €	75.297,14 €	HR	75.297,14 €
HU via SHAREDEV3		103.370,00 €	HU	103.370,00 €
LT via DG EMPL wave 7 +Part A wave 8		167.792,93 €	LT	167.792,93 €
LV via DG EMPL wave 7 +Part A wave 8		113.897,36 €	LV	113.897,36 €
LUX*			LUX*	
MT own/+via DG EMPL wave 7 + Part A wave 8	25.000,00 €	143.968,34 €	MT	143.968,34 €
PT*partially via SHAREDEV3		97.280,00 €	PT*partially via SHAREDEV3	97.280,00 €
SK via DG EMPL wave 7 +Part A wave 8		104.510,46 €	SK	104.510,46 €
RO via DG EMPL wave 7 +Part A wave 8		125.507,54 €	RO	125.507,54 €
	3.346.692,58 €	1.747.704,52 €	total expenditures	4.206.135,36 €
Total income		5.094.397,10 €	Surplus/deficit	888.261,74 €

NIA IAG4 2018			Biomarker 2018	
NIA grant			DBSS Analysen	
total income		1.242.350,87 €	total expenditures	1.242.350,87 €
		1.242.350,87 €	Surplus/deficit	- €

* funding not via SHARE-ERIC

Figure 2: Detailed flow of funds in calendar year 2018

Figure 2 provides more detail by country and category. Figure 2 shows the expenditures that occurred in 2018 and the related incomes. Figure 2 is defined by SHARE activities occurring in 2018, while Figure 1 above was defined by account movements in 2018. The totals differ slightly between the two figures since, on the one hand, some income arrived already in 2018 and, on the other hand, some expenses which are attributable to 2017 were invoiced only in 2018. We show the situation according to the final accounts per 31.12.2018 as of March 2019.

Several line items are worth noting. All countries

have paid their membership fee. Second, not all country accounts for the survey expenses are balanced. Estonia, Italy and Slovenia show negative balances. In those countries, the excess survey expenses have been covered by the previous account balance. Austria, Croatia, Germany, Greece, Poland and Spain have positive balances, resulting in an overall balance of 888,261.74. Most of this balance is due to the fact that these countries have sent funds in 2018 for expenses to be paid in 2019 or later. Moreover, in Germany, the positive balance is compensating for the negative balance at the end of 2017 which was due to a time gap in transfers within the German funding institutions.

Funding all of SHARE

SHARE funding is complex. First, the overlap between SHARE and SHARE-ERIC is only partial such that different rules and funding mechanisms exist for ERIC and non-ERIC countries. Second, there are many national idiosyncrasies as explained below. Third, there is a multitude of funders on the international and the national levels. In Wave 8, as of April 2019, we have 65 different funding sources which contributed €10,000 or more, plus smaller contributors.

Total costs of the entire SHARE operation during the two years of Wave 8 are expected to be about €32.3m (€16.1m per annum) for the 28 participating countries, based on currently expected sample sizes and costs as already contracted. This amount is detailed in the SHARE Masterbudget and includes the international coordination in and out of Munich as well as all national activities. While SHARE is relatively expensive for a social sciences project, it is much cheaper than most of the ESFRI projects in the natural and life sciences, although SHARE includes a large set of biomedical and cognitive tests more typical for life science than social science projects.

Overall funding for SHARE has four different cost components:

- The largest component (about €20.4m) is running the survey in each of the 28 SHARE countries. 16 countries finance the survey of wave 8 entirely from national funds or in combination with EU-Structural funds granted at the national level. The eight new countries have

been financed in 2018 mostly by the European Commission through a contract between SHARE-ERIC and DG EMPL. Partially, funds from national funders in some of the countries could be added as co-funding in 2018. In 2018 another five crisis countries were financed by the European Commission through an H2020 grant which could be also topped by some national co-funding in those countries.

- International coordination in Wave 8 had two components:
 - First, the international coordination activities which take place at the Munich headquarter (about €4.7m). They are mainly covered by a grant from the Federal Ministry for Research and Education (BMBF) and the Max Planck Society (MPG).
 - Second, Commission support (H2020 call INFRADEV3) has been granted for the international coordination activities which take place in Denmark, France, Israel, Italy and The Netherlands (about €3.2m).
- Finally, several other grants (H2020, US National Institute on Aging; totaling about €3.9m) finance innovation and harmonization activities. Particularly noteworthy is the support by the US National Institute on Aging (NIA) which is funding those parts of the survey that are closely harmonized with the US Health and Retirement Study, the sister survey of SHARE, e.g., physical health measurements such as grip strength and the accelerometer study in wave 8. It also includes several laboratory anal-

yses of the dried blood spot samples (DBSS) in Seattle, Washington State, and the extended cognition measures in Wave 8.

- Only about a third of the overall SHARE expenses and contributions are flowing through SHARE-ERIC. Not all SHARE member countries are currently SHARE-ERIC members. In addition, not all expenses for SHARE-ERIC members are showing up in the ERIC accounts. This has can be explained by the fact that, first, most ERIC members pay the personnel in kind (mostly as salaries by the universities and other scientific institutions). Second, some ERIC members also pay the survey expenses directly. This is the case, e.g., if the survey is conducted by a university or scientific organization rather than subcontracted to a third-party provider.
- In turn, third-party grants (e.g. H2020, DG EMPL and US NIA) received by SHARE-ERIC are partially dedicated to non-SHARE-ERIC members (e.g. support by the EU Commission for new and crisis countries) and to purposes for all of SHARE (e.g. support in 2018 by the EU Commission for software programming and area coordination outside of Munich).

Financial Plan for SHARE-ERIC 2019

Figure 3 presents the financial plan for 2019 based on the known contributions as of April 2019 and expected expenditure items. Note that only a fraction of the expected income has been credited on the SHARE-ERIC account so far. This holds for both membership fees and participation fees as well as country contributions for Wave 8.

The financial plan is separated by: income from ERIC membership and participation fee and their

usage; income from EU-COM and its usage; survey contributions and costs; biomarker and accelerometer grant and associated expenditures.

Several line items are worth noting:

1. International coordination ex Munich will still be covered for the first half of 2019 through the two H2020 grants SHARE-DEV3 and SER-ISS. However, this support ends in mid-2019 and urgently needs to be extended. One of the two last year's grant proposals to Horizon 2020 for a common innovation project with other social sciences and humanity research infrastructures (SSHOC) was successful, the other (SUSTAIN), planned to finance the international coordination ex-Munich as well as the crisis countries, submitted in March 2018 was rejected. The main reason of the rejection by the European Commission was the evaluators' judgement that the incapability of SHARE-ERIC to fund central tasks and the survey in some SHARE countries through the member states was essentially due to "moral hazard" and "free riding" on survey costs or in general on common costs by some countries. Although this criticism might be true for some countries, we note two intertwined facts: first, the SHARE Consortium comprises more countries (28) than SHARE-ERIC (16), and second, the users of SHARE data (amongst them the European Commission itself) are also interested in data of those countries which do not participate financially in the survey for one reason or another.

An extraordinary SHARE-ERIC Council reacted on 17 December 2019 by increasing the membership fee for ERIC members and introducing a new participation fee for non-ERIC members in SHARE as an urgency measure to allow for continuation of SHARE wave 8 in 2019. These

fees will cover the cost of software programming and running the software for all SHARE countries until the end of 2019.

2. A new Horizon 2020 grant proposal named COHESION has been submitted in March 2019. It is strictly limited to innovation tasks and scientific area coordination ex Munich and does not comprise routine tasks of software programming nor country support (surveys and personnel).
3. In the ERIC member countries the situation for the main survey of Wave 8 at the time of the start of Wave 8 field rehearsal in March 2019 is

still uncertain in Bulgaria, Cyprus and Greece.

4. Funding of the main survey in Estonia, Finland, Lithuania, Latvia, Malta, Portugal, Slovakia, Spain and Romania is subject of a new DG EMPL grant. This grant is designed to cover the first expenditures of the main survey. A second grant proposal with a start date in 2020 is supposed to cover the remaining cost of wave 8. It requires at least 20% of national co-funding
5. Countries marked by an asterisk will fund the survey directly without funds flowing through SHARE-ERIC; the respective rows are therefore empty.

Income	Amount	Actually paid*
Membership/participation fee 2019		
AT	25,000,00 €	Y
BE	29,950,00 €	N
BG	10,050,00 €	Y
CH*	19,950,00 €	Y
CY	20,050,00 €	Y
CZ	20,050,00 €	Y
DE	29,950,00 €	Y
DK*	15,000,00 €	N
EE	10,050,00 €	N
ES	19,950,00 €	Y
FI	15,000,00 €	N
FR	29,950,00 €	N
GR	20,050,00 €	Y
HR	20,050,00 €	Y
HU	20,050,00 €	N
IL	25,000,00 €	N
IT	29,950,00 €	Y
LV	10,050,00 €	N
LT	10,050,00 €	N
LUX*	15,000,00 €	N
MT	10,050,00 €	N
NL	29,950,00 €	Y
PL	20,050,00 €	N
PT	10,050,00 €	N
RO	10,050,00 €	N
SE	29,950,00 €	N
SI	20,050,00 €	N
SK	10,050,00 €	N
expected income	535,350,00 €	
actual income*		245,000,00 €
		still missing: 290,350,00 €

* as of 1 April 2018

Expenditure	Amount
ERIC administration 2019	
Account charges/transaction fees	1,000,00 €
Auditor	6,000,00 €
Budget SMB/travel	48,000,00 €
0.5 FTE accountant	29,000,00 €
Council meeting	4,000,00 €
ERIC network etc.	6,000,00 €
Other admin (translations, notary, domaine)	5,000,00 €
Data protection expert for agency checks	4,000,00 €
Print annual activity report	8,000,00 €
IT support: CentERdata Tilburg	422,025,00 €
total expected expenditures	533,025,00 €
Expected surplus/deficit	- 288,025,00 €

Figure 3: Financial plan for calendar year 2019

EU-COM 2019		
SERISS	187.068,80 €	Y
SHARE-DEV3	447.985,00 €	Y
COHESION	310.214,56 €	Y
expected income	945.268,36 €	
actual income		945.268,36 €

Int'l Coordination ex Munich, 2019	
IT support: CentERdata Tilburg	74.475,00 €
Economics Area: Padua	188.435,58 €
Economics Area: Venice	208.485,92 €
Health Area: Odense	174.296,34 €
Social Area: Jerusalem	134.919,66 €
Survey Mgmt/Methodology: Paris	78.655,00 €
Health Care Area: Wuppertal	78.425,00 €
SHARE-ERIC Admin: Madrid	5.000,00 €
expected expenditures	942.692,50 €
Expected surplus/deficit	2.575,86 €

Survey contribution 2019 (estimated W 8 total survey cost minus costs paid in 2018)		
Country	own	DG EMPL/SHAREDEV3
AT	1.413.000,00 €	
BE*		
CZ	145.750,00 €	
DE	2.046.500,00 €	
FR*	1.404.455,00	
GR own/partially via SHAREDEV3		299.437,00 €
IL*		
IT	464.645,00 €	
NL	- €	
PL	460.000,00 €	
SE	1.058.562,00 €	
SI	314.900,00 €	
BG via DG EMPL		83.954,00 €
CH*		
CY via DG EMPL	63.000,00 €	93.500,00 €
DK*		
EE own/partially SHAREDEV3		409.700,20 €
ES cofunding+/partially SHAREDEV3		508.227,17 €
FI via DG EMPL	30.000,00 €	294.677,00 €
HR SHAREDEV3+SF		444.800,00 €
HU own		250.000,00 €
LT via DG EMPL		278.120,00 €
LV via DG EMPL		258.420,43 €
LUX*		
MT partially via DG EMPL	25.000,00 €	118.790,00 €
PT* partially via SHAREDEV3		194.000,00 €
SK via DG EMPL		139.093,00 €
RO via DG EMPL		195.191,00 €
expected income	7.425.812,00 €	3.567.909,80 €
		10.993.721,80 €

Survey costs 2019 (estimated W 8 total remaining survey cost)	
Country	Amount
AT	1.413.000,00 €
BE*	
CZ	145.750,00 €
DE	2.046.500,00 €
FR*	1.404.455,00 €
GR own/partially via SHAREDEV3	369.437,00 €
IL*	
IT	464.645,00 €
NL	- €
PL	460.000,00 €
SE	1.058.562,00 €
SI	314.900,00 €
BG	83.954,00 €
CH*	
CY	156.500,00 €
DK*	
EE	409.700,20 €
ES	508.227,17 €
FI	324.677,00 €
HR	444.800,00 €
HU own	250.000,00 €
LT	278.120,00 €
LV	258.420,43 €
LUX*	
MT	143.790,00 €
PT* partially via SHAREDEV3	194.000,00 €
SK	139.093,00 €
RO	195.191,00 €
expected expenditures	11.063.721,80 €
Expected surplus/deficit	- 70.000,00 €

NIA IAG4 2019		
NIA grant	35.000,00 €	Y
NIA grant	70.000,00 €	Y
expected income	105.000,00 €	
actual income		105.000,00 €

Biomarker 2019	
DBS laboratory analyses	35.000,00 €
Accelerometer study preparation	70.000,00 €
expected expenditures	105.000,00 €
Expected surplus/deficit	- €

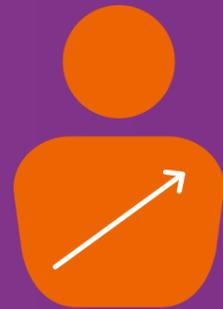
Figure 3: Financial plan for calendar year 2019

SHARE IN NUMBERS

SHARE
IN
NUMBERS

IMPACT

Number of Registered Users



7,421
in year 2017

8,891
in year 2018

2017: **424**
2018: **507**

Processed  User Requests

Policy Actors Using SHARE Data



2017: **396**
2018: **434**

User Workshops

2017: **5**
2018: **4**



User Countries

78 in year 2017
79 in year 2018



Publications

2017: **1,860**
2018: **2,186**

SSCI-ranked Publications

2017: **540**
2018: **672**



Own Publications Published as Open Access

2017: **100%**
2018: **100%**

European Coverage

Wave 6: **18 of 28 Countries**
Wave 7: **28 of 28 Countries**

Respondents

Wave 6: **120,000**
Wave 7: **140,000**



Interviews

Wave 6: **300,000**
Wave 7: **380,000**



Please note that these numbers are presented for the purpose of obtaining a quick overview of SHARE's operations – they cannot and should not, however, be used to compare SHARE against other Research Infrastructures (RIs) since KPIs with the same names often have fundamentally different meanings for different RIs. The number of users, for instance, heavily depends on the type of RI and the modes of access. Commercial partners are, for example, necessarily excluded by the nature of SHARE as a social survey based on voluntary participants who report very private health and economic data. Commercial use is thus out of the question due to SHARE's strict protection of the data of its respondents, which in turn affects the number of users. Another example is the financial volume of business with external contractors, which is obviously very different between RIs with mainly digital services and e.g. physical RIs that operate heavy machinery in large facilities. The construction/maintenance costs they require cannot be compared to those of social surveys. Similar specifics are to be taken account in all areas of RI operations.

SCIENTIFIC PARTNERS OF

AUSTRIA

University of Linz, Dept. of Economics

The Department of Economics at the University of Linz directs the Austrian participation in the SHARE project. Its research focus being is labour economics, public economics and problems of pension reform as well environmental economics. It will be represented by Rudolf Winter-Ebmer, Professor of Economics and specialist in empirical labour economics.

BELGIUM – NL

University of Antwerp, CSP

CSP's principal objective has been to study the adequacy of social policies. Its research is mainly based on large-scale socio-economic surveys of households. Koen Decancq, leads the Belgian Country Team.

BELGIUM – FR

University of Liège, CREPP

CREPP's main fields of specialisation are social security, retirement behaviour and well-being among the elderly and intergenerational transfers. Sergio Perelman is in charge of the SHARE project coordination in the Belgian French-speaking community.

BULGARIA

Institute for the Study of the Societies and Knowledge at the Bulgarian Academy of Sciences (ISSK-BAS), Sofia

The mission of ISSK-BAS is to ensure an adequate knowledge of social processes and to contribute to optimizing policymaking in the social-economic field. Country Team Leader for Bulgaria is Ekaterina Markova.

CROATIA

University of Zagreb, Faculty of Economics and Business (FEB)

FEB is the most important institution of higher education and research in economics in Croatia. The Centre for Longitudinal Population Studies (CLPS) at the FEB coordinates Croatian participation in the SHARE study. The Centre's research activity is focused on international multidisciplinary population surveys, with dominant reliance on longitudinal survey data. Šime Smolić leads the Croatian Country Team.

CYPRUS

University of Cyprus, Economics Research Centre

The Economics Research Centre of the University of Cyprus (CypERC) is an independent non-profit research institution aiming at high-quality policy-oriented research in economics with emphasis on subjects concerning the Cyprian economy. The CypERC is financed by research organisations in Cyprus and the European Union, through competitive funding procedures, and contributions from governmental and other organisations. The research activities of the CypERC are divided into the sectors of Microeconomic Analysis and Welfare, Macroeconomic Forecasts and Analysis, Employment, and other research projects. Nikos Theodoropoulos, Assistant Professor at the Department of Economics and member of the academic council of CypERC, is the leader of the Cyprian Country Team.

CZECH REPUBLIC

Center for Economic Research and Graduate Education – Economics Institute (CERGE-EI), Prague

CERGE-EI is fully accredited in both the United States and the Czech Republic. Its main expertise is in social, economic and political transition in the Central and Eastern European countries and in the former Soviet Union region. Radim Bohacek leads the Czech Country Team.

FRANCE

LEDa-LEGOS, Paris-Dauphine University

The Department of Health Economics and Management (LEDa-LEGOS) at Paris-Dauphine University is one of the leading departments for Health Economics in France. LEGOS's main fields of specialisation are economics of ageing, health inequalities, social security and health systems efficiency. Florence Jusot, Professor of Economics, leads the French Country Team.

GERMANY

Max Planck Institute for Social Law and Social Policy, Munich Center for the Economics of Aging (MEA)

Central coordination of SHARE takes place at MEA. MEA is a world-renowned centre of excellence for the economics of ageing. It moved 2011 from Mannheim to Munich after an offer to become part of the

SHARE-ERIC MEMBERS

Max Planck Society. Research areas are savings, social insurance and public policy; macroeconomic implications of population ageing; and public health. MEA has been the coordination center of SHARE since its first wave. MEA is represented by Axel Börsch-Supan, director. The German Country Team is part of the Economics and Policy Research Department of the TUM School of Management which examines economic processes with a focus on the role of public policy. It addresses contemporary policy issues by means of theoretical as well as empirical investigations into economics (e.g. of aging). The German Country Team Leader is Annette Scherpenzeel.

GREECE

Panteion University, Athens

Panteion University is a public institution centering on social and political sciences. Economics, sociology, social anthropology and psychology are major disciplines while regional development & public administration are interdisciplinary departments where cross-cutting viewpoints from many disciplines met. Antigone Lyberaki leads the Greek Country Team.

HUNGARY

Centre for Economic and Regional Studies of the Hungarian Academy of Sciences

The basic activity of the Centre for Economic and Regional Studies, consisting of the Institute of Economics, the Regional Research Institute and the Institute of World Economics, is the scientific analysis of the Hungarian economy, the international economic and political environment, and of economics in general. The Centre undertakes theoretical and empirical studies in the fields of national and world economics, in regional processes and in other interdisciplinary areas of the Social Sciences. Aniko Biro leads the Hungarian Country Team.

ISRAEL

The Hebrew University of Jerusalem, IGDC

The Israel Gerontological Data Center (IGDC) at the Hebrew University in Jerusalem facilitates research and dissemination of data on ageing, and directs the Israeli participation in the SHARE project. Howard Litwin leads the Israeli Country Team. He also serves as area coordinator of the social network area in SHARE.

ITALY

University of Padua, Dept. of Economics

Padua's Department for Economics and Management covers the whole spectrum of economics and management science, in particular applied econometrics, public and health economics as well as labour economics. Guglielmo Weber leads the Italian Country Team. He also serves as deputy coordinator of SHARE.

THE NETHERLANDS

Utrecht University School of Economics

The Utrecht University School of Economics focuses on social themes concerning the future of work, behavioural insights for policymaking, entrepreneurship, sustainable finance, and sustainability and economic development. Adriaan Kalwij leads the Dutch Country Team.

POLAND

Warsaw School of Economics

Warsaw School of Economics is the oldest university of economics in Poland and one of Europe's leading universities in this field. Agnieszka Chłoń-Domińczak is the Polish Country Team Leader.

SLOVENIA

Institute for Economic Research Ljubiana (IER)

The Institute for Economic Research (IER) is the leading institute for macroeconomic research in Slovenia, which recently focuses particularly on economic, social and health aspects of structural reforms in Slovenia. Boris Majcen leads the Slovenian Country Team.

SWEDEN

Centre for Demographic and Ageing Research, Umeå University

Centre for Demographic and Ageing Research (CEDAR) is an interdisciplinary centre for research on long-term demographic trends and ageing from a social science, humanistic and health perspective. A part from the research CEDAR also produces a number of large longitudinal datasets including both contemporary and historical demographic, socio-economic and health information. Gunnar Malmberg is director of research at CEDAR and leader for the Swedish Country Team.

SCIENTIFIC PARTNERS

DENMARK

University of Southern Denmark, Institute of Public Health, Odense

ESTONIA

Tallinn University, Estonian Institute for Population Studies, Tallinn

FINLAND

Väestöliitto, Helsinki

LATVIA

Riga Stradins University, Riga

LITHUANIA

University of Vilnius, Vilnius

LUXEMBOURG

Luxembourg Institute of Socio-Economic Research, Esch-sur-Alzette

MALTA

University of Malta, Malta

OF SHARE

PORTUGAL

Universidade do Minho, Braga

Universidade Nova de Lisboa, Nova School of Business and Economics, Faculdade de Economia, Lisboa

ROMANIA

Alexandru Ioan Cuza University of Iasi, Faculty of Economics and Business Administration, Iasi

SLOVAKIA

University of Economics in Bratislava, Bratislava

SPAIN

Centro de Estudios Monetarios y Financieros (CEMFI), Madrid

Girona Biomedical Research Institute (IDIBGI), Girona

SWITZERLAND

University of Lausanne, Institute of Health Economics and Management (IEMS), Lausanne



VISIT YOUR COUNTRY TEAM ONLINE:

Austria	www.share-eric.eu/at
Belgium	www.share-eric.eu/be
Bulgaria	www.share-eric.eu/bg
Croatia	www.share-eric.eu/hr
Cyprus	www.share-eric.eu/cy
Czech Republic	www.share-eric.eu/cz
Denmark	www.share-eric.eu/dk
Estonia	www.share-eric.eu/ee
France	www.share-eric.eu/fr
Finland	www.share-eric.eu/fi
Germany	www.share-eric.eu/de
Greece	www.share-eric.eu/gr
Hungary	www.share-eric.eu/hu
Israel	www.share-eric.eu/il
Italy	www.share-eric.eu/it
Latvia	www.share-eric.eu/lv
Lithuania	www.share-eric.eu/lt
Luxembourg	www.share-eric.eu/lu
Malta	www.share-eric.eu/mt
Netherlands	www.share-eric.eu/nl
Poland	www.share-eric.eu/pl
Portugal	www.share-eric.eu/pt
Romania	www.share-eric.eu/ro
Slovakia	www.share-eric.eu/sk
Slovenia	www.share-eric.eu/si
Spain	www.share-eric.eu/es
Sweden	www.share-eric.eu/se
Switzerland	www.share-eric.eu/ch



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