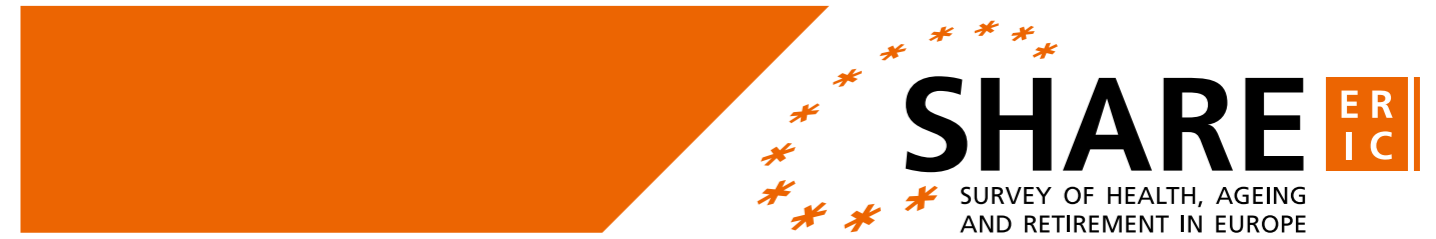


# ANNUAL ACTIVITY REPORT 2019/20





**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

The omnipresence of the corona crisis in all areas of work and private life demands our full attention. And we still cannot predict how we will emerge from this global threat and when. However, one remarkable observation is now shared by many more citizens than before the crisis: Science serves humankind and our well-being strongly relies on scientific progress. Permanent investment in education and research infrastructures is an asset that increases the resilience of societies. And here is where SHARE comes into play. As a joint endeavour of today 28 nations we look back to 16 successful years of data collection in eight waves enabling scientific progress and to special achievements in 2019 which are described in this Annual Activity Report.

After the turbulences in 2018 due to an unexpected lack of funding and the resulting shift of Wave 8, SHARE-ERIC could enter again calmer waters: In mid 2019 SHARE has been awarded an INFRADEV 3 grant from the European Commission to lead a new Horizon 2020 project “SHARE COHESION” from autumn 2019. This offers SHARE the possibility to focus on innovation in SHARE as well as on ways to reach long-term sustainability: SHARE is determined to explore all ways to secure the seamless continuation of the survey in all EU Member States including the use of structural funds.

However, this “European Coverage” will not be reached without additional funding options offered by the European Commission: SHARE’s mission to deliver a complete picture of the EU as a kind of observatory for scientists can only succeed if there are additional ways to prevent impending gaps due to SHARE countries that fail to provide sufficient funding.

In order to set the course for the future the SHARE-ERIC Council has approved two major decisions in 2019: First, to strengthen SHARE further, we increased the amount of fees for membership and participation in the survey. Second, we embarked on a process in order to prepare the extension of the survey beyond 2024.

Both decisions are signs of appreciation and strong signals for the willingness on the part of the SHARE countries to support SHARE also in the future.

I take the opportunity to thank both, the European Commission, in particular DG RTD and DG EMPL – as well as the SHARE countries for their continuous engagement to secure SHARE’s operation. I expand my gratefulness to all members of the Consortium and SHARE staff for the fine collaboration during the two years of my chairmanship.

Farewell and read well!




Dr. Klaus Schindel  
SHARE-ERIC Chair

## FOREWORD FROM THE MANAGING DIRECTOR

What a change! This report was prepared in the early months of 2020 and is based on the achievements of SHARE in 2019. Since then, the world has changed dramatically due to the Corona pandemic, and SHARE was forced to change as well. In mid-March the spread of the new Coronavirus SARS-CoV-2 has forced us to suspend SHARE’s ongoing data collection for Wave 8. This decision was not easy to make, but the health and protection of SHARE’s respondents and interviewers – many of whom belong to the vulnerable risk group of people aged 60+ – must come first.

SHARE, however, tried to turn a catastrophe into an opportunity. First, SHARE provides an ideal infrastructure to study the effects of the pandemic. The investment in eight waves of data collection pays off in many ways. SHARE’s strength is to determine the impact of the pandemic on living conditions that we have routinely recorded: labour market status, income, family and social contacts, inter- and intra-generational help, differentiated by living conditions, by the three age groups in SHARE (still working, young retirees, oldest old), by income situation and by their health history. This data has been available since 2004. This enables us for instance to compare the effects of the Corona crisis with those of the financial crisis, and to trace whether the negative economic, social and health effects of the pandemic are hitting those who were anyway disadvantaged.

Moreover, we decided not to give up Wave 8 but to switch to shortened but targeted telephone interviews. This gave us the chance to ask Corona-specific questions. They include epidemiological questions like “Have you been tested?”, economic questions like “Have you been affected by short-time work or unemployment?”, sociological questions like “Did somebody help you getting groceries?”, and finally, questions about the quality of the healthcare system like “Did you get access to a doctor in good time?”. The exciting thing is, of course, not only to answer these questions in a single country but to record the differences between the European countries.

This lets me come back to last year’s Annual Activity Report under the motto of “European Coverage”. We are so glad that we have achieved European coverage since Wave 7. And we are so glad that all 28 countries participated enthusiastically in helping to convert Wave 8 to a Corona-specific multidisciplinary survey.

We are very grateful for the support and enthusiasm of our faithful respondents, the many scientists involved in SHARE and you, our funders. SHARE brings us all together in a better understanding what we need to minimize the health, social and economic costs of this pandemic.




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

# WHAT IS SHARE?

## The Survey of Health, Ageing and Retirement in Europe

Population ageing is one of Europe's most pressing problems in the 21<sup>st</sup> 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.

### SHARE – a Longitudinal Study

In order to grasp the dynamic character of the ageing process, SHARE has been conceptualised as a longitudinal study. This means that, unlike cross-sectional studies which compare different individuals with the same characteristics, SHARE is able to follow the ageing process because it tracks the same people and their development over time. By conducting multiple survey waves, SHARE documents how respondents react to the same questions and measurements in the individual waves and, by comparing them, developments over time are rendered visible. In its longitudinal design, SHARE's multi-disciplinary approach allows not only for social and economic analyses but, for example, for medical insights as well as SHARE can be used to uncover predictors of certain diseases. Furthermore, SHARE combines the prospective collection of data in each new wave with retrospective data collection, thus making it possible to evaluate the impact of past policy measures on the lives of the respondents. Its longitudinal character means that SHARE's scientific value increases with each new wave of data collection: the more waves have been conducted, the better the ageing process can be analysed.

### 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., and the International Coordinator, Dr. Annette Scherpenzeel, 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 2019

- **Collecting and Releasing SHARE data:** Since its beginning, SHARE has released Waves 1 to 7, which contain data of around 380,000 interviews of about 140,000 respondents. In Wave 7, eight new countries have joined SHARE, now covering 26 continental EU Member States plus Switzerland and Israel. (pp. 16–17)
- **New Release 7.0.0 of Waves 1 to 7:** SHARE Release 7.0.0, which contains first Wave 7 data, was made publicly available to the scientific community worldwide in spring 2019. The new release comes with major improvements, innovations and updates. Wave 7 data has a special structure because it contains SHARELIFE modules for all respondents who did not participate in SHARELIFE in Wave 3, focusing on respondents' life histories. (pp. 18–19)
- **First Results from SHARE Waves 6 and 7:** SHARE has released its latest First Results Book in June 2019. Based on data from Wave 6 and 7, the book presents 38 short studies covering the topic Health and Socio-economic Status over the Life Course. 85 authors from 17 countries contributed to this comprehensive volume. (pp. 20–21)
- **Record Linkage:** SHARE developed record linkage projects in several countries in order to supplement the survey data with administrative data. By the end of 2019, four successful record linkage projects have been established in SHARE: Germany, Denmark, the Netherlands, and Austria. For Wave 8, two additional countries (Finland and Italy) are establishing a record linkage project. (p. 22)
- **The SHARE Biomarker Project:** SHARE had implemented the collection of dried blood spots (DBS) to obtain further objective health information in Wave 6. After first analyses of around 8,000 samples in 2017 at the University of Washington, USA, an analysis of the remainder of circa 17,000 samples will start in early 2020. Additionally, validation studies to make DBS comparable to venous blood samples (VBS) were performed and are currently being evaluated. (p. 23)
- **Release of SHARE Wave 7 Methodology Volume:** SHARE has released a methodology volume for Wave 7, which documents the most important questionnaire innovations, methodological advancements and new procedures introduced during the seventh Wave of SHARE. Topics reach from collection of retrospective data on life histories, the newly introduced 10-item Big Five Inventory to measure personality, over sampling design, weighting strategies and fieldwork monitoring to a new monitoring programme for interviewers. (pp. 24–25)
- **Cognition and Ageing:** SHARE will adopt the Harmonized Cognitive Assessment Protocol (HCAP) to measure bio-medical and socio-economic precursors of cognitive decline by 2021. With this new project, SHARE will join an international research network of harmonized HCAP studies and help to identify which conditions over the life course affect cognition in later life. (p. 27)
- **Cognition in Wave 8:** SHARE integrated new and innovative cognitive measures to the SHARE questionnaire in Wave 8. These carefully selected and tested measures, which are harmonized with the HRS sister study in the United States, allow SHARE to contribute to the knowledge on the causes of dementia by identifying risk factors from SHARE data. (pp. 28–29)
- **Train the Trainer (TTT):** SHARE once again successfully implemented its Train-the-Trainer sessions before the start of Wave 8 fieldwork in October 2019. The TTT training program conveys all technological, logistical and managerial aspects of successful fieldwork and proved itself as a valuable tool for exchange and training in preceding waves. (pp. 30–31)
- **Preparation of Wave 9 Questionnaire:** SHARE has included several novelties in its Wave 9 Questionnaire. For the first time, new content was selected through an open call for researchers. Further, it will reintroduce different objective health measurements as well as the interviewer survey, which has proven to be a very useful tool to avoid interviewer effects. (pp. 32–33)
- **The SHARE-COHESION Grant:** SHARE was awarded a new grant by the European Commission in 2019. COHESION supports the survey's supranational innovation and development tasks from Waves 8 to 10. This ambitious endeavour will increase SHARE's salience in research and demonstrate its impact within the scientific community and among public policy makers. (pp. 34–35)
- **SHARE Users & Publications:** In September 2019, SHARE has reached a milestone by recording its 10,000th user registration. With about 1,500 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. This is reflected in the number of publications based on SHARE data, which had risen to more than 2,600 by the end of 2019. (pp. 36–51)
- **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. In 2019, several user workshops and a user conference took place all over Europe. Furthermore, SHARE offers a helpdesk to which users can send their questions. (pp. 52–53)



# COLLECTING AND RELEASING SHARE DATA

## Updated release of Wave 7 data is scheduled for spring 2020

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 Wave 7, eight new countries (Bulgaria, Cyprus, Finland, Latvia, Lithuania, Malta, Romania, and Slovakia) have joined SHARE, now covering 26 continental EU Member States plus Switzerland 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 two Latin American countries (Mexico and Brazil).

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 latest re-

lease of Wave 1 to 7 in Spring 2019, SHARE provides data which has been generated by around 380,000 interviews (including main interviews as well as End-of-Life interviews) on about 140,000 respondents in 29 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)<sup>1</sup>.

### Survey Participation in SHARE

Figure 1 provides an overview about the development of the number of successful interviews in all released samples over time. 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.

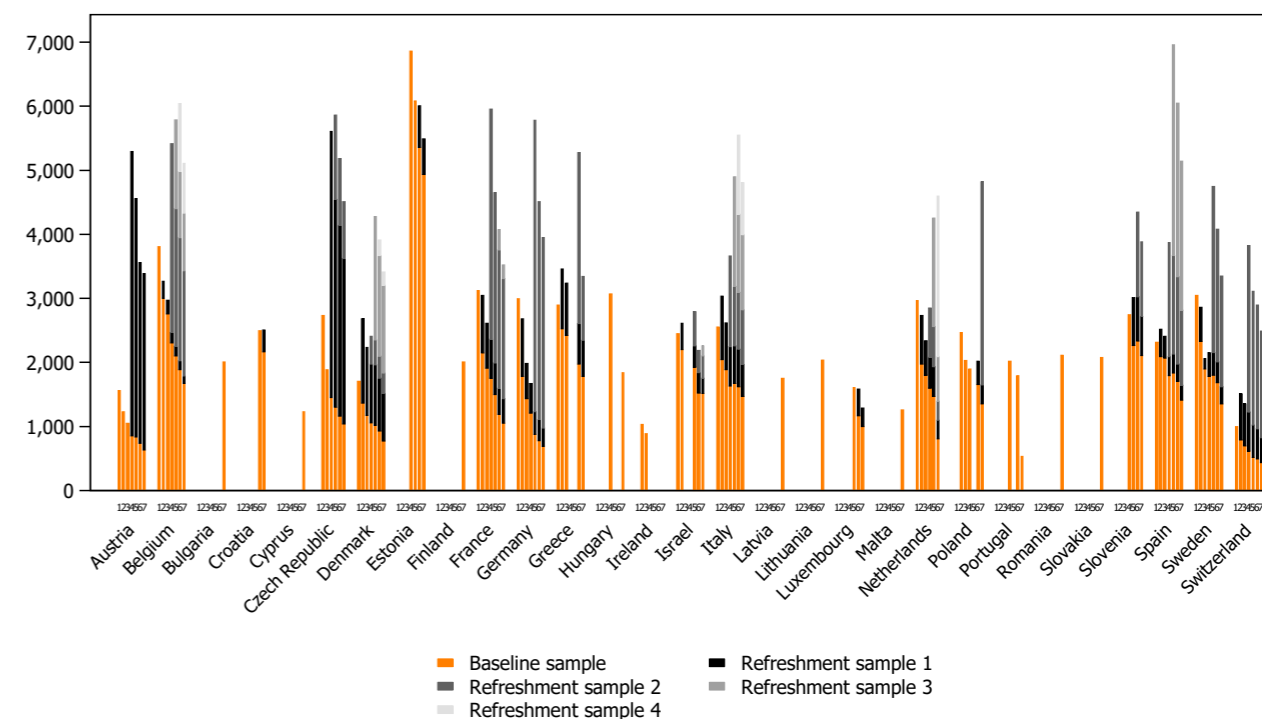


Figure 1: Overview of released samples in SHARE

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 re-

port “Survey Participation in the Survey of Health, Ageing and Retirement in Europe (SHARE)” that is updated with every data release and can be found on the SHARE website.<sup>2</sup>

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

<sup>2</sup> Available online: <http://www.share-project.org/share-publications/share-working-paper-series.html>

# DATA RELEASE

## New Release 7.0.0 of Waves 1 to 7

In spring 2019, SHARE Release 7.0.0 was made publicly available to the scientific community worldwide. The new release of Waves 1 to 7 comes with some major improvements. It comprises the latest state of data cleaning, harmonisation across waves as well as a considerable range of innovations and updates like updated weights and imputations of all SHARE waves. In Wave 7, a large number of countries joined SHARE: Hungary was recovered and with Bulgaria, Cyprus, Finland, Latvia, Lithuania, Malta, Romania and Slovakia eight

new countries joined SHARE entailing full coverage of all continental EU Member States.

Compared to previous waves, the structure of the Wave 7 questionnaire is special because it contains SHARELIFE modules for all respondents who did not participate in Wave 3 (82% of respondents), as well as regular panel modules for all respondents who already participated in the SHARELIFE interview of Wave 3 (18% of respondents).

SHARELIFE data focuses on respondents' life histories. Most of the information collected in the regular SHARE waves is about the current life circumstances. As a result, we know little about what happened earlier in the respondents' lives. SHARELIFE gathers information that is more detailed on important areas of our respondents' lives, ranging from partners and children over housing and employment history to detailed questions on health and health care. SHARELIFE data complements the SHARE panel data by providing life history information to enhance our understanding of how early life experiences and events throughout life influence the circumstances of older people. With this variety, SHARELIFE constitutes a unique cross-national, interdisciplinary database for research in the fields of sociology, economics, gerontology, and demography.

For the first time in Wave 7, the 10-item Big Five Inventory (BFI-10) was introduced. This is an established personality inventory measuring the "Big Five" personality dimensions with two items each. Introduced by Rammstedt and John (2007), the BFI-

10 is an ultra-short measure of personality suitable especially for multi-theme surveys in which assessment time and questionnaire space are limited. Further information on the "Big Five" measurement is available in the Wave 7 First Results Book.

Together with the new release of the regular SHARE data, easySHARE was updated, too. easySHARE is a simplified SHARE dataset for student training, and for researchers who have little experience in quantitative analyses of complex survey data. It stores information on all respondents and of all currently released data collection waves in one single dataset. Additionally, a new release of the SHARE Job Episodes Panel (JEP) came out in spring 2019. The JEP is a generated dataset based on SHARELIFE information of Waves 3 and 7 that contains information on the labour market status of each respondent throughout her/his life. The JEP dataset can be complemented by information about institutions, public policies and macroeconomic conditions individuals were confronted with in the course of their lives.

Respondent type	Interview sections	No. of interviews				
Respondent participated in Wave 3	<table border="1"> <tr> <td colspan="2"><b>Regular Panel</b></td> </tr> <tr> <td colspan="2">DN CH PH BR CF MH HC EP GS SP FT CO AS HO HH AC EX IV</td> </tr> </table>	<b>Regular Panel</b>		DN CH PH BR CF MH HC EP GS SP FT CO AS HO HH AC EX IV		13.959 (18%)
<b>Regular Panel</b>						
DN CH PH BR CF MH HC EP GS SP FT CO AS HO HH AC EX IV						
Respondent did not participate in Wave 3	<table border="1"> <tr> <td><b>SHARELIFE</b></td> <td><b>Regular Panel</b></td> </tr> <tr> <td>RC RP RA CC RE WQ DQ FS HS RH GL</td> <td>(condensed)</td> </tr> </table>	<b>SHARELIFE</b>	<b>Regular Panel</b>	RC RP RA CC RE WQ DQ FS HS RH GL	(condensed)	62.561 (82%)
<b>SHARELIFE</b>	<b>Regular Panel</b>					
RC RP RA CC RE WQ DQ FS HS RH GL	(condensed)					

Figur 1: Structure of the Wave 7 Questionnaire

# FIRST RESULTS FROM SHARE WAVES 6 AND 7

## Investigating the interplays of health and socio-economic status over the life course

Based on the data from the panel's 6<sup>th</sup> and 7<sup>th</sup> Wave, SHARE's latest First Results Book presents 38 short studies covering the topic Health and Socio-economic Status over the Life Course. The book has been published with DeGruyter in June 2019 and is available Open Access to best reach policy-makers and researchers.

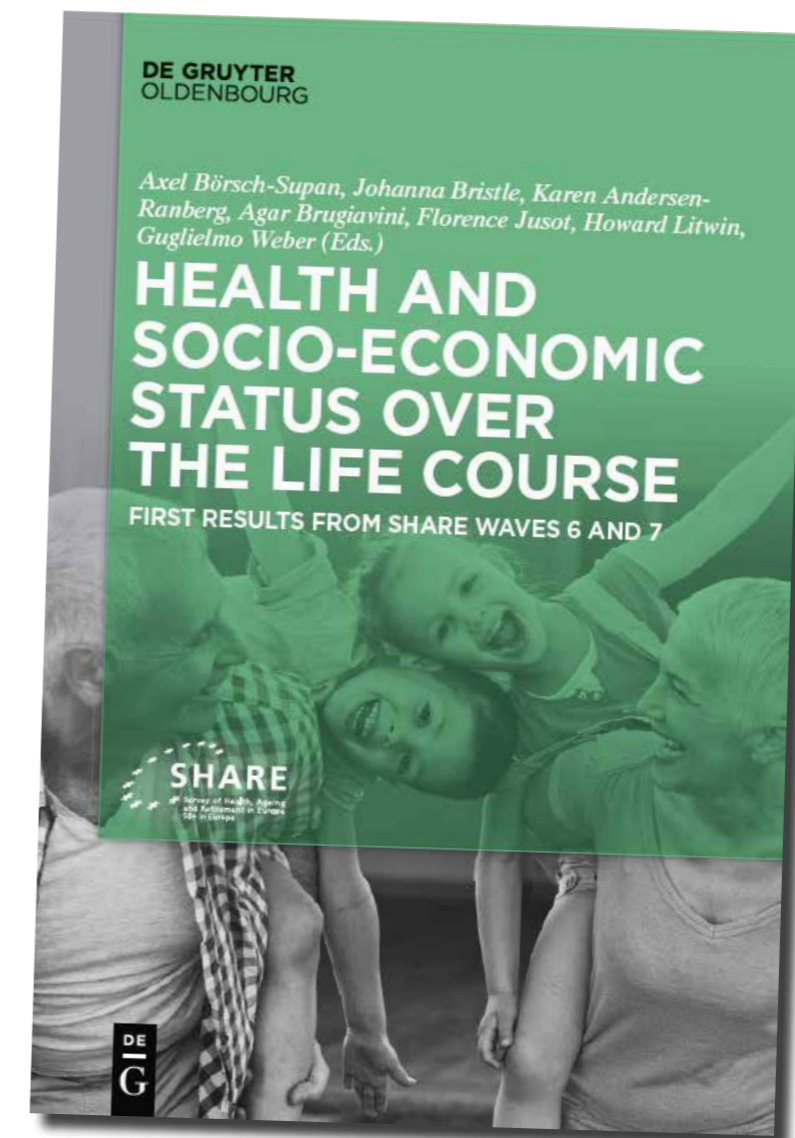
A person's health, economic status and social embeddedness is not determined in isolation. Rather, mutual interactions over the entire life course shape them; departing from an individual's biological make-up, parental conditions and early education. Waves 6 and 7 add three important innovations to this triangle and make SHARE a powerful tool for investigating ageing societies in Europe: Wave 6 deepens the objective measurement of health via biomarkers, Wave 7 strengthens SHARE's longitudinal dimension by collecting life-history data in all 28 countries.

Many contributions in this First Results Book use the life-history data from Wave 7, as well as earlier life histories collected in Wave 3, resulting in varying studies: From the development of personality

in early childhood and its influence until late in life; over the generation of health inequalities during the life course by inequalities in education and income; the description of labour market careers, occupation and retirement; to social transitions in the new accession countries and the effects of the economic crisis.

Other parts focus on how people live in older age: how does our social network change in older age, and how is this related to our health? These questions can now be answered by exploiting the longitudinal social network data, another innovation in Wave 6. In addition, healthcare, health behaviours, and objective health such as obesity or grip strength are subject of the book, and contribute to our understanding of the ageing process. The book closes with a first look at one of the surveys latest and most promising innovations, the dried blood spot analyses.

Overall, 85 authors from 17 countries contributed to making the First Results Book a comprehensive volume, which is already used by national, European and global policymakers for optimal policy design.



Have a look inside the book:

<https://www.degruyter.com/view/product/509241?format=G>

# RECORD LINKAGE

## Linking Survey Data to Administrative Data

SHARE aims to develop record linkage projects in several countries in order to provide administrative data supplementing the survey data. Research on aging does not only depend on the respondents' survey answers, there is also huge potential using administrative information from appropriate institutions.

By the end of 2019, four successful record linkage projects have been established in SHARE - Germany, Denmark, the Netherlands, and Austria. In the German record linkage project "SHARE-RV", ongoing since SHARE Wave 3 in 2009, SHARE data of almost 4500 German respondents has been linked to the administrative data of the German Pension insurance. The linkage project in Denmark ("REG-LINK-SHAREDK") has been established in 2017. Up to now, data of the SHARE Waves 1 to 6 is linked to administrative data of Statistics Denmark as well as the Danish Health Data Authority. This combined data set offers, among other topics, information on employment behavior, health conditions, and aging processes. In summer 2019 the Netherlands also released their linked data set ("Linkage SHARE NL"). In this instance, the SHARE data is linked to administrative microdata from Statistics Netherlands (CBS). This data contains, among others, information on health, labour, social security, income, and wealth. In the Austrian "SHARE HV-AMS" project, data received from the Main Association of Austrian Social Security Institutions and the Public Employment Service Austria was linked with the assistance of the Austrian Ministry of Social Affairs. This data combines information on demographics, employment, education, income, and social insurance with panel survey data.

The use of various linked data sources offers a wide range of research possibilities such as health, pensions, or data validation. For example, using the REG-LINK-SHAREDK data, Brønnum-Hansen et al. (2019) showed a social gradient in healthy lifetime expectancy between different occupational groups: regarding activity limitations as well as long-term illness the gradient was in favor of high skilled professionals. Mäcken (2019) used SHARE-RV data to analyze the effect of work stress on retirement age in Germany and found that lower job control and lower self-reported health lead to an earlier retirement.

For the eighth SHARE Wave, two additional countries (Finland and Italy) are establishing a record linkage project. In Finland the SHARE data will be linked to the register data of Statistics Finland as well as to the National Institute for Pensions (Kela) and the Finish Centre for Pensions (ETK). In Italy, administrative data from the Italian Social Security Institute (INPS) will be used for the record linkage. We expect these new linkage projects to be available following the first release of Wave 8 data.

### Literature:

Bronnum-Hansen, H., E. Foverskov and I. Andersen (2019): **Occupational Inequality in Health Expectancy in Denmark**. Scandinavian Journal of Public Health (online first). DOI: 10.1177/1403494819882138.

Mäcken, J. (2019): **Work Stress among Older Employees in Germany: Effects on Health and Retirement Age**. Plos One 14(2): e0211487. DOI: 10.1371/journal.pone.0211487.

# THE SHARE BIOMARKER PROJECT

## Status of the project: validating blood samples collected in Wave 6 for field conditions

In Wave 6, SHARE had implemented the collection of dried blood spot (DBS) samples to obtain further objective health information. About 27,000 blood samples have been collected in 12 countries and are stored in the SHARE biobank in Odense, DK. About 25,000 samples yielded enough blood for some or all markers SHARE had intended to analyse.

In 2017, circa 8000 samples were transferred to the Department of Laboratory Medicine at the University of Washington (UW), Seattle, USA for analyses of the following blood biomarkers: HbA1c, total Hemoglobin (tHb), total Cholesterol (CHO), HDL-cholesterol (HDL), Triglycerides (TRG), C-reactive protein (CRP), and Cystatin C (CysC). Analysis of these samples was completed in May 2018. The remainder of circa 17,000 samples was transferred to Seattle in November 2019; analyses will start early 2020.

The analysis of 16,000 DBS samples for markers of inflammation, risk of cardiovascular disease and neurodegeneration/cognitive decline was completed August 2018 by the laboratory at Staten Serum Institut (SSI) in Copenhagen.

For the analyses of blood biomarkers, venous blood samples (VBS) would be the preferred method as values are directly comparable to known health data. The collection of venous blood entails major logistic hurdles and is prohibitively expensive for a very large and cross-national survey such as the SHARE. Therefore, SHARE had chosen to collect DBS from a simple finger prick. However, laboratory results from DBS assays cannot be directly com-

pared to the results one would obtain from standard assays of "gold standard" VBS even if created under standardized laboratory conditions. Moreover, varying fieldwork conditions and sample quality add further variance to the biomarker levels measured in field-collected DBS samples. It is therefore important to compute a conversion formula, which translates the DBS values obtained under fieldwork conditions into gold standard VBS values.

In fall of 2018, SHARE performed a validation study together with the Department of Laboratory Medicine. DBS from a finger prick (capillary blood) and venous samples were collected from volunteers in a blood bank in Seattle. In a controlled experiment, the DBS samples were exposed to different environmental and collection conditions mimicking the field conditions during the SHARE blood collection (varying: temperature, humidity protection, drying and shipping times, as well as different spot sizes). Unexposed and exposed samples were analysed for the same markers of diabetes and blood fats mentioned above; all DBS and VBS values were compared and a conversion equation was computed.

In 2019, we performed an analogue validation experiment for the inflammation/cytokine markers analysed at SSI (the neurotrophin BDNF, VEGF, MCP1, EGF, Clusterin, the interleukins IL-16, IL-8, IL12/23, IL-18, and the lipoprotein APOe4). The group of volunteers included older patients from a falls clinic in Odense showing cognitive impairment of different degree as well as younger healthy controls. The evaluation is ongoing; a conversion equation will be calculated.

# RELEASE OF SHARE WAVE 7 METHODOLOGY VOLUME

## Panel innovations and life histories

SHARE has released a methodology volume for Wave 7. This volume documents the most important questionnaire innovations, methodological advancements and new procedures introduced during the seventh Wave of SHARE. The key innovation of Wave 7 was the collection of retrospective data on life histories in combination with the traditional panel approach of SHARE. This extended the life history data collected in Wave 3 by including all new countries and all refreshment samples, which were added since them, thus giving a detailed picture of the status of individuals in the complete EU with a view across their entire life courses. The retrospective questionnaire contained all important areas of the respondents' life histories, ranging from parental and childhood conditions, partners and children, housing and financial history and employment history to detailed questions on health and health care. In addition, the Wave 7 life history instrument included some new questionnaire content that was not yet part of the instrument of Wave 3, such as new measures on the interpersonal environment during childhood, on intergenerational cohabitation, and on experiences of war, persecution, or discrimination experienced by the parents of the respondents. In addition to the innovations in the life history instrument, some other new questionnaire content was also included in Wave 7. For example: the 10-item Big Five Inventory to measure personality was implemented in Wave 7 after it had been postponed in Wave 6, and questions on palliative care were added to the end-of-life questionnaire.

The volume furthermore documents the software innovations introduced in Wave 7, the sampling design and weighting strategies as well as interviewer training, fieldwork monitoring and survey participation. Two more important innovations are contained within this book. First, a special monitoring programme was implemented in Wave 7 to identify individual interviewers producing deviant data quality. This program used a more complex approach than usual in survey research, incorporating indicators from CAPI (computer-assisted personal interviewing) data as well as paradata combined in a multivariate cluster analysis to distinguish deviant patterns of interviewing behaviour. The results were used to provide survey agencies with an informed sample for interviewer back checking during the ongoing fieldwork, thus improving the quality of the SHARE data at each stage of the survey. Second, the SHARE Data & Documentation Tool was introduced. This new tool is a fast, customisable, easy-to-use web interface for browsing and searching the SHARE (meta) data, and as such adds to the already existing comprehensive documentation material. SHARE's unique combination of a cross-national study with a panel design, including many waves, constitutes a complex data set. The new tool allows researchers to more easily track questions and variables across waves and countries.



**Have a look inside the book:**

[http://www.share-project.org/fileadmin/pdf\\_documentation/MFRB\\_Wave7/SHARE\\_Methodenband\\_A4\\_WEB.pdf](http://www.share-project.org/fileadmin/pdf_documentation/MFRB_Wave7/SHARE_Methodenband_A4_WEB.pdf)

# SHARE INNOVATIONS

## Foreword from the international coordinator

SHARE has been at the forefront of survey innovations since the beginning. The core panel questionnaire has over time been extended with various novelties like physical performance measures, dried blood spot samples, life histories, social network measures and accelerometry. In addition, the SHARE interviewing, translation and monitoring tools have paved the way for other cross-national surveys that aim to harmonise their fieldwork across countries. To continue this pioneering role also in the coming years, SHARE in 2019 obtained the new SHARE Cohesion Grant, which is described on page 34.

In Wave 8 as well as Wave 9, the new extensions consist of further tests of cognitive function in tight coordination with the US Health and Retirement Study. In Wave 8, for which fieldwork started in 2019, several tests were added to the cognition module in the panel questionnaire, which is described on pages 28 and 29. In Wave 9, for which preparations started in 2019, an in-depth measurement of cognition among a subsample of SHARE respondents will be carried out in addition to the normal panel data collection, as described on page 27. As an innovation to questionnaire development, SHARE users were invited, for the first time in 2019, to submit proposals for a new short add-on module in the questionnaire of Wave 9. In this way, SHARE hopes to in the future open up the questionnaire development for innovation from different sources. This and other innovations in Wave 9 are described on pages 32 and 33.

At the time of publication of this report, the Wave 8 data collection, which started end of 2019, was suspended as a result of the COVID-19 pandemic. The Wave 8 face-to-face interviewing was not resumed anymore. Instead, SHARE changed to telephone interviewing using a special "SHARE Corona" questionnaire in all 28 countries. This short-term change in interviewing mode, made out of necessity, might also accelerate SHARE's transition to a new data collection methodology in future waves.

Thus, thanks to numerous actors of the SHARE family, we were able to position ourselves as an innovative scientific actor on various research fields again in 2019 and are striving to do so in the future.




Dr. Annette Scherpenzeel  
International Coordinator of SHARE-ERIC

# COGNITION AND AGEING

## Bio-medical and socio-economic precursors of cognitive decline in SHARE

The expected increase in the prevalence of dementia in ageing populations is a major concern both from a health and an economic point of view. Dementia is currently without actual cure but symptom progression may be delayed if risk factors for cognitive impairment are diagnosed and treated at an early stage.

The general aim of this new project in SHARE is to exploit the international variation of health and life circumstances in Continental Europe to identify which interactions of bio-medical and socio-economic conditions over the life course affect cognition in later life. The understanding of such life-course pathways to first mild cognitive impairment and then, possibly, dementia, should help in developing preventive early interventions.

The project will administer in-depth measurement of cognition according to the Harmonized Cognitive Assessment Protocol (HCAP) that has been developed for the HRS-style ageing surveys. HCAP consists of a recently developed battery of in-depth cognition measures<sup>1</sup>. More specifically, it consists of about one hour of subject cognitive testing and a twenty-minute informant interview, both of which can be administered in the home or care facilities by survey interviewers with advanced training.

The measures included in HCAP were selected by three criteria: (a) can be administered in the home by a survey interviewer in about one hour, (b) can be administered comparably and lead to compara-

bly valid assessments in other countries where HRS-type surveys are conducted, and (c) has sufficient overlap with the 2002/03 HRS-ADAMS study that it can be used to establish trends in the prevalence of cognitive impairment in the US.

HRS has established a research network to support the continued harmonization of the HCAP studies and address harmonization challenges across the studies. In addition to the US, England, Mexico, India, China and South Africa have thus far participated in HCAP. SHARE has been in consultation with the HCAP Project Advisory Board and the HCAP network on adapting HCAP to its local requirements while maintaining as large a core of identical measurement as possible. The project will be implemented in about five SHARE countries in a randomly drawn stratified study sample of 2,500 SHARE panel respondents following similar protocols as HRS, plus taking dried blood spot samples (DBSS) from selected respondents. DBSS will be analyzed for parameters related to cognitive decline and diseases that typically occur in later life. Fieldwork of HCAP is scheduled to start by the end of 2021.

Using these data, the project will estimate prevalence rates of mild and severe cognitive impairment in the SHARE countries; compare these with HRS and other participants in the HCAP studies; and exploit the international variation of the SHARE plus SHARE-HCAP data in order to identify which interactions of biomedical and socioeconomic conditions over the life course affect cognition later in life.

<sup>1</sup> Weir, D. McCammon, R., Ryan, L. and Langa, K. (2014). Cognitive Test Selection for the Harmonized Cognitive Assessment Protocol (HCAP). Accessed in March 2020 at: [https://hrs.isr.umich.edu/sites/default/files/biblio/HCAP\\_testselection.pdf](https://hrs.isr.umich.edu/sites/default/files/biblio/HCAP_testselection.pdf)

# COGNITION IN WAVE 8

## Integration of new cognitive measures to SHARE

A great innovation was the integration of new cognitive measures to the SHARE questionnaire. Several competing objectives had to be traded off against one another in the selection of tests. The first goal was harmonization with the HRS sister study in the United States. Therefore, mostly tests that were already in use in the HRS were selected. Second, we wanted to include tests that relate to different cognitive domains. Third, the tests needed to be applicable in the SHARE countries. This means that they were supposed to be neither copy-righted tests nor could they have a strong linguistic or cultural component. Fourth, the tests should be rather short in administration, as a maximum of 5 minutes for all new tests was set. Last but not least, the tests will serve as a screening tool for the Harmonized Cognitive Assessment Protocol (HCAP interview, see page 27) to identify respondents with low cognitive functioning. In order to choose the tests serving these goals, we consulted the HCAP advisory board, which is a group of specialists from neuroscience, gerontology, survey-methodology, and cognitive science, who ranked the tests.

### Self-rated memory change

A self-report of memory change is relevant for detecting impending problems in memory before clinical tests. It is known that people expressing subjective memory complaints have a higher risk of developing Alzheimer's disease (Reid, 2006). This is especially true for people with high levels of cognitive abilities since these people would still score high on cognitive tests despite an onset of cognitive decline. As memory complaints are also associated with mental problems such as anxiety

disorders or depression, the SHARE questionnaire addresses these as well. The question wording was taken from the HRS survey. This single-item question of about 11 seconds neatly fits into the existing questions on cognitive abilities.

### Backwards count

Backwards count is a speed test under (assumed) time pressure. It measures processing speed and attention. The respondent is asked to count backward as quickly as possible from the number 20 (to 10).

In normal aging, there will be subtle or no decline in people's ability to count backwards, whereas for people with Alzheimer's disease, there will be strong decline. The test is part of TICS (telephone interview for cognitive status; Brandt et al., 1988). SHARE uses the HRS version of this test, which is slightly adjusted by counting fewer numbers and integrating the element of time pressure.

### Object naming test

The object naming test measures semantic memory by asking the respondents to recall three simple words. There is typically no decline in semantic memory for the normal aging brain but a strong decline for patients of Alzheimer's disease. The questions were taken from TICS. With less than half a minute on average, this was a quick test.

### Drawing exercises

Drawing exercises, also known as constructional praxis test, measure visuospatial skills. Again, there is only a subtle decline in the normal aging brain

but a strong decline for people with Alzheimer's disease. The respondent is asked to copy two intersecting infinity loops, a three-dimensional cube, and to draw a clock face with numbers and place the hands correctly at ten past five. The clock draw is a very common screening test for cognitive impairment in memory clinics and different versions of this test exist. The test was taken from the non-licensed Addenbrooke's Cognitive Examination-III (ACE-III) battery, which is a paper-and-pencil test and therefore had to be adapted to the CAPI mode. As a result, the interviewers have to do the scoring right away while in the ACE-III test, and then a clinician scores the drawings after the completion of the test.

### Proxy Cognition questions

Proxy (or informant) interviews are a key source of information for accurate diagnosis of cognitive decline and dementia in clinical settings. They provide information on the respondent's prior and current cognitive and physical function. The questions measure decline in memory, decline in other mental abilities (like temporal orientation, learning, decision making, handling financial matters, and reasoning) and problematic behavior (like wandering off). The questions were taken from the HRS questionnaire. HRS used the short form of the Informant Questionnaire on Cognitive Decline in the Elderly (Jorm IQCODE). The original scale was adapted slightly by changing the timeframe for changes in mental abilities from 10 years to 2 years. A particular strength is that the IQCODE is relatively unaffected by education and pre-morbid ability or by proficiency in the culture's dominant language (Jorm, 1994). The original IQCODE questionnaire takes 4.46 minutes (in the HRS version) and was shortened to half the length to be included in SHARE. The need to shorten the scale was mainly driven by the restriction that the respondent should not be present while the proxy

answers questions about the respondent's mental abilities. Therefore, questions that capture similar constructs or questions that ask about infrequent behavior were dropped completely. For example, a question about learning new things in general was kept, but a question on learning to use a new gadget or machine around the house was dropped. For seven of the remaining 14 questions, the follow-up questions "Is it much worse or a bit worse?", "Is it much improved or a bit improved?" were dropped as well. This resulted in a reduction from a 5-point scale to a 3-points scale: "Improved - Not much changed - Gotten worse" instead of, "Much improved - A bit improved - Not much changed - A bit worse - Much worse." In the end, the questions took slightly more than two minutes.

With introducing these new cognitive measures, SHARE contributes to improve the knowledge on the causes of dementia by identifying (modifiable) risk factors from SHARE data. It will also facilitate research on the consequences of dementia by measuring the burden of dementia on sick people and their partners and by comparing the societal burden across different countries.

### Literature

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Jorm, A. F. (1994). A short form of the Informant Questionnaire on Cognitive Decline in the Elderly (IQCODE): development and cross-validation. *Psychological medicine*, 24(1), 145-153.

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# TRAIN THE TRAINER

## Preparations for data collection of Wave 8

In order to prepare all participating countries for the main fieldwork of Wave 8 in October 2019, SHARE conducted two test rounds (pretest and field rehearsal). Shortly before these test rounds the so-called Train-the-Trainer (TTT) sessions took place. The TTT training program conveys all technical, logistical and managerial aspects of successful fieldwork and proved itself as a valuable tool in preceding waves. The participants of the TTT are representatives of the involved survey agencies who are instructed to then pass on the obtained information to their interviewers during National Training Sessions in the respective countries.

The TTT sessions for the pretest took place in June 2018 in Munich and the training for the field rehearsal took place in March 2019 in Munich. In addition, SHARE provided a third training in September 2019 in Frankfurt, right before the main data collection. In contrast to the pretest TTT, the trainings before the field rehearsal and before the main fieldwork were each organized as one single session with all involved representatives present. This opportunity for exchange was appreciated by the participants as it enabled them to learn from the contributions and questions of everyone else.

Each TTT session had a different focus depending on the development stage. The TTT sessions that followed after the pretest focused on changes since the pretest phase. The revisions highlighted at this state concerned the instrument, study protocols,

and basic fieldwork monitoring procedures. Details of the questionnaire were also covered in these sessions. The field rehearsal is the dress rehearsal for the main data collection and therefore simulates an environment that is as close as possible to that of the main fieldwork. The TTT session at the final stage – before the main survey – continued where the field rehearsal training left off and focused on gaining respondents' cooperation. The main difference between the final training session and the sessions that were conducted for the test rounds is an even stronger focus on hands-on training in the use of the software and on the interview scenario – from contacting a household and handling refusals to conducting the actual interview. In addition to that, the main TTT agenda included a session on fieldwork monitoring.

The format of the TTT sessions combined lectures with slide presentations and group exercises. A key element was the mock interview, which is a simulation of an actual SHARE interview with TTT attendees taking on different roles: all TTT attendees are encouraged to volunteer as interviewers and to read out questions to a "mock" respondent. The mock interview was structured to include as many potentially complicated scenarios as possible, thus exposing the interviewers to difficult parts of the questionnaire.

A special focus during the training for Wave 8 was on the new cognitive measures. Training is essential

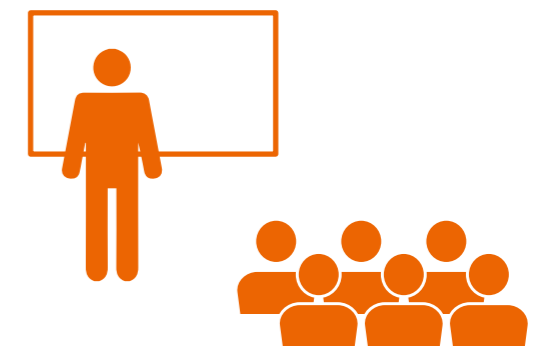
for conducting the tests of the cognition module. The majority of the tests were developed for use in clinical settings, where they are administered by professionals (like psychologists, nurses, or psychiatrists). During the Train-The-Trainer sessions, each test was explained in detail, giving background and practical information for interviewers for correct administration and scoring. For the drawing exercises, a quiz on correct ratings for the National Training Sessions (NTS) with solutions was provided.

Another successful format was the TTT group exercises in which attendees were asked to discuss their "best practices" to gain respondent cooperation. The results were then presented at a plenary session. For example, during the main fieldwork TTT, the attendees were split into different groups to discuss how to maximize response rates and manage difficult interview situations. This resulted in a valuable exchange of strategies to improve communication with respondents and to keep both interviewers and respondents motivated.

In addition to the TTT sessions, the software development team CentERdata organized a session to instruct the survey agency IT managers on how to operate the software tools, in particular the Sample Distributor (SD, the server that contains the national household sample). It was an innovation in Wave 8 to organize these IT sessions as a recorded webinar so the whole staff of the survey agencies could watch the training again if needed. A special

service from CentERdata in Wave 8 were the one-on-one remote online sessions to help each survey agency separately to correctly install the Sample Control on their servers.

The data collection for Wave 8 started in October 2019 and will end in June 2020. By middle of November 2019, most countries had completed their interviewer trainings and had already conducted their first interviews. One notable exception is Portugal, which again experienced issues with securing funding, thus precluding them from starting on time with the other countries in their group.





# PREPARATION OF WAVE 9 QUESTIONNAIRE

## New modules as well as an interviewer survey expand SHARE data

For the ninth Wave of SHARE, several novelties with regard to the questionnaire content are currently being prepared: a module on sleep behavior; an extension of the health care module asking respondents about their dental care and the availability of, and changes to, their general practitioner; more detailed questions on internet usage; a module on ageing awareness, assessing the respondent's awareness of age-related changes, such as changes in their mental capacity; an addition to the questions on eating habits, providing context about serving sizes to reduce data noise; more extensive questions on money management; and further efforts to harmonize cognitive measures in SHARE with the USA Health and Retirement Study.

All waves of SHARE include objective health data (biomeasures) in the form of physical performance measures but besides the grip strength measurement, not all measurements were taken in every wave. Wave 9 will reintroduce the so-called chair stand measurement (used as a predictor of subsequent disability or hospitalization), which was last administered in Waves 2 and 5.

In addition to that, Wave 9 will continue to administer the core survey questions as part of SHARE's cross-national data collection.

A procedural innovation was the introduction of an open call for new content in Wave 9. Researchers were invited to submit applications proposing a set

of questions for a new module, to be fielded in Wave 9 of the Survey for Health, Ageing and Retirement in Europe. The open call offered the opportunity to design an add-on module addressing a topic of ageing, demographic change or social and political challenges in Europe. The module was asked to address a key academic or policy concern within the European arena and should be beneficial to the cross-country and longitudinal dimension of SHARE. Among all module applications one new add-on module was selected by the Management Board. The selected module is called "care expectations" and asks more detailed questions on respondents' expectations regarding their needs and costs for care insurances. The proposed module investigates individuals' beliefs about their probability of developing limitations in activities of daily living (ADL) sometime in the future, and their beliefs regarding the chances that their family and the public health care system will cover their needs, if and when they develop such limitations.

To foster the successful and efficient development of the questionnaire and thus to ensure the quality of the data collected within the framework of a survey, two methods were implemented: cognitive questionnaire pretesting and "translatability" checks.

For completely new items, cognitive pretesting was conducted by GESIS to explore whether the respondent understood the questions as intended

by the creators of the question, and was able to answer with confidence.

The translatability checks aimed at validating the assumption that a source questionnaire is clear enough for translation into the SHARE languages. It identifies potential issues in translation and adaptation. SHARE Central selected a set of questions of the Wave 9 new content and asked a selection of country teams (Switzerland, Denmark, Hungary, Poland, Israel, Greece, Germany) to provide their feedback. The choice of country teams was made with the aim of covering a wide range of the languages spoken in the SHARE project. The feedback provided by the country teams are reported back to the Area Coordinators, who may then rephrase the questions and/or improve the guidelines for the translators.

Performing both tests now will improve the quality of the generic version and will save time later in the process by avoiding back-and-forth communication involving 28 country teams.

Since Wave 5, SHARE has invited all participating countries to additionally take part in the SHARE interviewer survey. The goal of this project is to collect data on SHARE interviewers prior to fieldwork, which then can be made available to researchers and linked with the SHARE main survey data. Interviewers are important actors within the process of conducting a survey, and as such, they can influ-

ence the quality of the data by introducing measurement error or even bias. In Wave 9, the fourth round of the SHARE interviewer survey is planned to take place, including new sets of questions related to interviewer's attitudes towards surveys, sense of professionalism towards the job, preference for intellectual challenges, job-related burden and attitudes toward the elderly adult population, among others. As in previous waves, the questionnaire further assesses interviewer experience, behaviour, persuasion techniques, as well as reasons for being an interviewer. The questionnaire was revised with the help of experts in the field and will be implemented again as an online survey. The descriptive comparison of interviewer characteristics shows the variation among interviewers within and between countries. This finding is an important prerequisite to the identification of the interviewer characteristics that can explain interviewer effects. In order to attenuate effects that current fieldwork may have on attitudes and reported behaviours, the interviewer survey will be conducted at the national training sessions.



# THE SHARE-COHESION GRANT

## Overview and objectives of the new grant agreement awarded by the European Commission

Ever since its inception in 2004, SHARE has aimed at growing to achieve European coverage. One precondition of running a cross-national panel survey like SHARE and increasing membership numbers is sustainable funding. In fall 2019, SHARE was awarded the COHESION grant by the European Commission to support the survey's supranational innovation and development tasks from Waves 8 to 10. According to the grant agreement, COHESION stands for "Cohesion in further developing and innovating SHARE across all 28 member countries". A major part of the grant is foreseen for newly-hired personnel to assist Area Coordinators, survey designers, and the International Coordination team in implementing scientific, survey methodological, and software development tasks for all eleven Work Packages. The grant also sponsors capacity building through training measures tailored to managers, operators, scientists, professionals in survey agencies, and data users.

The project's main objectives are scientific and methodological innovation and development. Six Work Packages are designed to revise, upgrade, create and coordinate questionnaire content including device-based measures. Their focus is on scientific content such as health, health care, and socioeconomic environment. This includes measures to collect more information on respondents' cognitive abilities, social networks, social integration, pension claims, savings, and time expenditure.

Apart from that, innovative accelerometer-based systems are used to quantify respondents' physical activity via their movement patterns. Wave 10 is planned to focus on all respondents that belong to the so-called baby-boomer generation.

Two Work Packages are specifically designed to enhance survey methods. They aim at increasing respondents' retention in SHARE, improving sampling frames and fieldwork monitoring, developing adaptive testing strategies, drawing up a data and documentation tool, and improving the software including their compatibility with handheld devices.

The remaining three Work Packages focus on the management and sustainability of SHARE and the communication and dissemination of the survey's results. This includes compliance with general data protection regulations and ethical requirements, gender-sensitive data and gender balance in scientific management, strengthening coordination between ERICs, global harmonization of ageing surveys, and the development of a "SHARE Cohesion Plan" to integrate as many member countries as possible with a uniform funding structure. Further commitments are to keep on providing users with open and free data access via the Research Data Center website, to continue hosting international conferences, user conferences, workshops, webinars, trainings, and summer courses, and to keep record of all scientific publications based on

SHARE, SHARE Working Papers, First Result Books, and Methodology Volumes on the SHARE website. Activities that will help position SHARE in the global network of ageing surveys and the public policy community are the elaboration of a common corporate design, newsletters, brochures, social media channels, EU meetings, seminars, and the Annual Activity Report.

Overall, the ambitious endeavors of COHESION will increase SHARE's salience in research on population ageing and demonstrate its impact within the scientific community and among public policy makers.



# SHARE USERS IN EUROPE

Number of users per country



# NUMBER OF SHARE USERS SURPASSES NEW THRESHOLD

## More than 10,000 Scientific SHARE Users

In September 2019, SHARE recorded its 10,000th user registration. By the end of the year, 10,368 registered scientific users from all over the world were counted. Thus, SHARE was able to attract almost 1,500 new scientists for the use of its data in the last reporting period. 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 success in attracting new users can be considered even more considerable in view of the fact that potentially interested users have to prove their scientific background in a registration process.

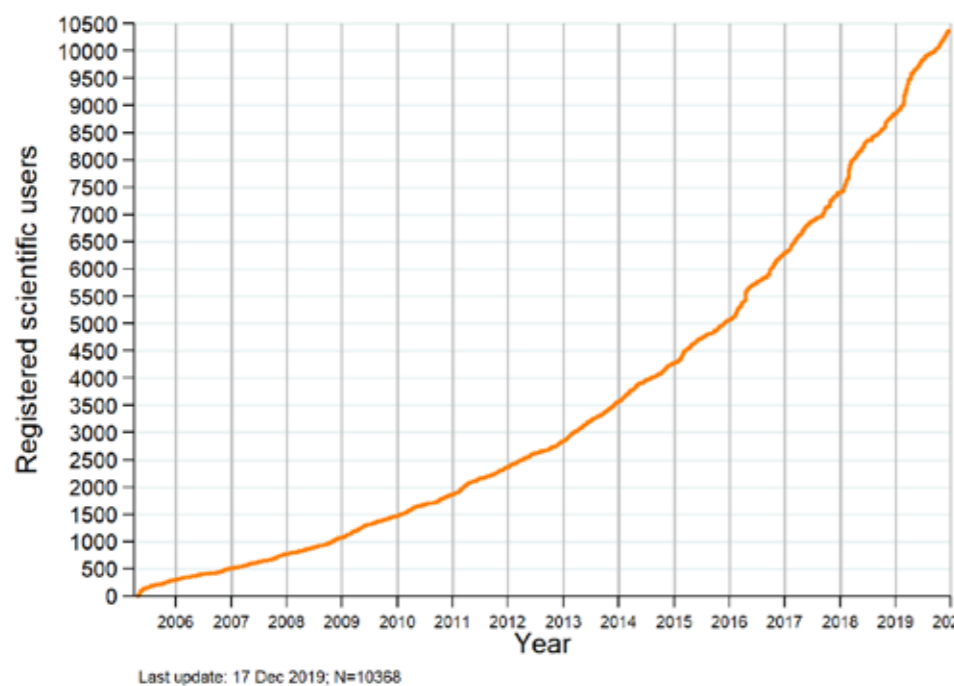


Figure 1: SHARE User Registrations over Time

Looking at the background of SHARE's users, they display diverse origins from all over the world who benefit from the study's international data. Data that 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. In 2019, SHARE users came from 81 different countries and all five permanently inhabited continents. The country with the highest number of registered users remains Germany with 2,037; followed by the United Kingdom with 1,030 and the Netherlands with 1,012 registered users. With 688 registered users, the USA rank fourth while also being the country with the highest number of SHARE users outside of Europe.

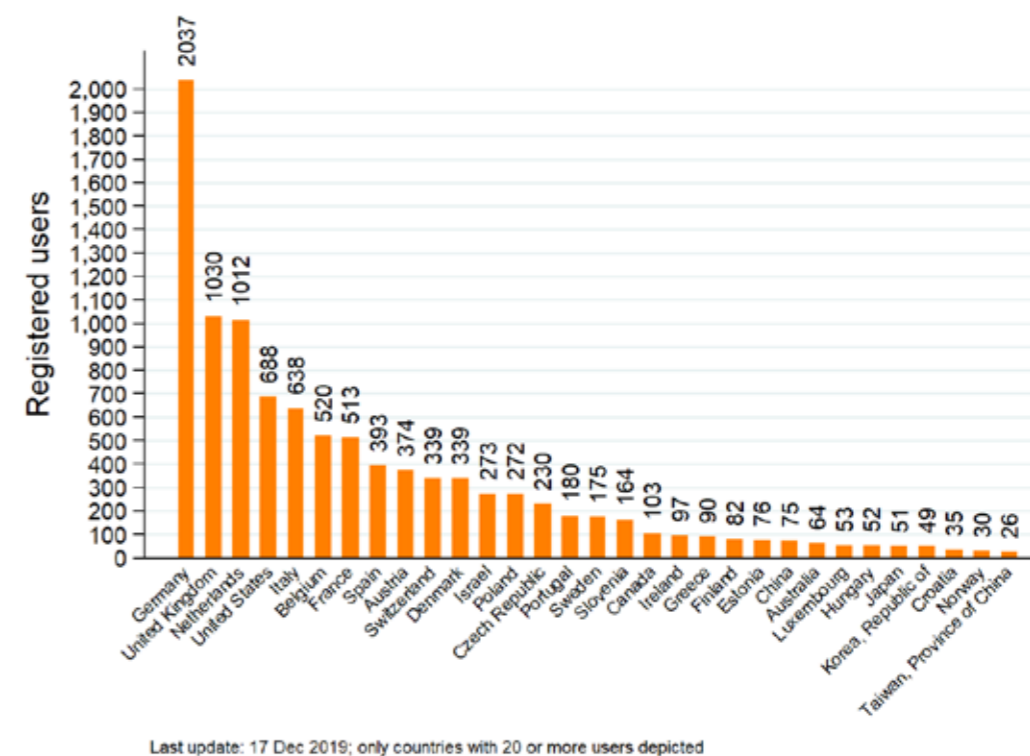


Figure 2: SHARE User Registrations by Country

# SHARE USERS

# ALL OVER THE WORLD



# SHARE-BASED JOURNAL PUBLICATIONS 2019

A–C

Aartsen, M., B. Cheval, S. Sieber, B. van der Linden, R. Gabriel, D. Courvoisier, I. Guessous, C. Burton-Jeangros, D. Blane, A. Ihle, M. Kliegel and S. Cullati (2019): **Advantaged Socioeconomic Conditions in Childhood are Associated with Higher Cognitive Functioning but Stronger Cognitive Decline in Older Age.** Proceedings of the National Academy of Sciences 116(12): 5478-5486. DOI: 10.1073/pnas.1807679116.

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# JOINT SHARE USER CONFERENCE AND BUDAPEST PENSION SEMINAR

## Researchers coming together to understand ageing societies better

In September 2019, more than 100 researchers from 18 countries met in Budapest to discuss ongoing research to understand the ageing process in its many facets better. More than 30 scientific papers were presented, sparked discussions and offered insights on physical and mental health, loneliness, work and retirement, care, cognition, life course developments, intergenerational support and social networks. The conference was specifically designed to facilitate lively exchange by combining plenary presentations with small group discussions in parallel sessions and a more informal setting

with roundtables on upcoming research topics and the social policy impact of SHARE.

The 6<sup>th</sup> SHARE User Conference highlighted the active and interdisciplinary SHARE research community and was successfully combined with the annual Budapest Pension Seminar. The joint conference was generously funded and hosted by the Hungarian State Treasury who put Budapest back on the map for excellent academic meetings by collaborating with the SHARE User conference series.



SHARE International Coordinator Annette Scherpenzeel in Budapest, 2019

# USER SUPPORT ACTIVITIES

## Documentation, email support and workshops

In order to facilitate working with the SHARE data, SHARE Central has established different user support activities. First, a comprehensible and continuously updated documentation of the datasets. This is essential for enabling researchers worldwide and from many different scientific disciplines to work with SHARE. Among the most important documentation files are the SHARE website, the SHARE Release Guide, and the SHARE Data & Documentation Tool. Additional files are e.g. the Scales and Multi-Item Indicators Manual and the Wave 7 module flow overview as well as module specific flowcharts for Wave 7. Second, the maintenance of the info@share-project.org email account. This is a central part of the user support activities by SHARE Central. Users have the opportunity to send all kinds of SHARE-related questions to this account. Responding to the researchers' questions within a short period, SHARE Central provides and further explains documentation material, answers questions on structure and content of the data, assists soon-to-be users with the data access procedure, records SHARE-based

publications, and – if necessary – forwards specific requests to country teams, area coordinators or the experts for weights and imputations.

A third part of the SHARE user support is the engagement in direct contact with researchers at user workshops and scientific conferences. The goals of these workshops are: (i) make researchers aware that SHARE exists, (ii) recruit new users, (iii) introduce users to the SHARE data, (iv) train and support both experienced and unexperienced users and (v) receive user feedback to constantly improve the data and the documentation material. Apart from the SHARE User Conference in Budapest in September 2019, SHARE user workshops took place in Helsinki and Jyväskylä. A joint German and Dutch SHARE User workshop was held at GESIS - Leibniz-Institute for the Social Sciences in Cologne. Additionally, SHARE Central was involved in various sessions and had an exhibition stand at the 8<sup>th</sup> conference of the European Survey Research Association (ESRA) in Zagreb.



SHARE User Conference in Budapest, 2019

“Everyone speaks about evidence-based policymaking, and this is the core of what SHARE data provides.”

Katarina Ivanković-Knežević  
(Director Social Affairs at DG for Employment, Social Affairs and Inclusion, 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

## Using SHARE data for optimal policy design

In 2011, the European Commission identified population ageing as one of the most pressing challenges of Europe in the 21<sup>st</sup> 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 policymakers with reliable and

comparable data to base their decisions on. In 2019, SHARE has continued to serve as a valuable source for a wide variety of policy analyses – from a local project on mobility and wellbeing of older people in urban areas to a global comparison of indicators for population health and health system performance by the OECD. We have selected some examples to illustrate the contribution of SHARE to local, national, European and global evidence-based policymaking.

“...SHARE represents an outstanding longitudinal study that can have a strong social impact in the fields of health, population ageing, and retirement.”

Institute of Macroeconomic Analysis and Development:  
Marijana Bednaš, Acting Director (Republic of Slovenia)

## ON THE LOCAL LEVEL

### Ageing in urban areas

In Portugal, a project is under way that addresses ageing in urban areas in the context of contemporary urban trends and policy goals, analyses older people's mobility patterns and how these issues affect their wellbeing. In the Portuguese urban areas of Aveiro, Faro and metropolitan Lisbon, the project will implement a sequence of three surveys, from which data on mobility of urban elders will be extracted. Here, SHARE data is used to characterize the target group in terms of sociodemographic data, life conditions, health, practices related to well-being as well as individual perceptions of the ageing process.<sup>1</sup>

## ON THE NATIONAL LEVEL

### Bulgaria

National high-level meeting on demographic challenges



On December 5<sup>th</sup>, Gabriela Yordanova and Ekaterina Markova from the Bulgarian country team represented SHARE at the “National high-level meeting on demographic challenges”, which the Bulgarian Ministry of Labour and Social Policy had organized. Gabriela Yordanova and Ekaterina Markova presented how SHARE data can be used for policy analyses, specifically to study the transition from labor to retirement, to Mariana Nikolova (Deputy Prime Minister on Economic and Demographic Policy), Denitsa Sacheva (Minister of Labour and Social Policy), Sultanka Petrova (Deputy-Minister of Labour and Social Policy) and other policymakers.

### Croatia

Improving the long-term care system



On November 4<sup>th</sup>, the Croatian SHARE team presented the SHARE project and its eighth survey Wave to policymakers in Croatia. At this event, attended by around 150 participants from the Ministry of Labour and Pension Systems, the Croatian Employment Service, the Croatian Health Insurance Institute, the Croatian Pension Insurance Institute and the scientific community, the benefits of the SHARE data in the implementation of evidence-based policies were presented. At this occasion, the Minister of Labour and pension Systems referred to the introduction of national benefit for the elderly (“Nacionalna naknada za starije osobe”) in Croatia in 2020. Croatian residents aged 65 and over with less than 15 qualifying years should be eligible for this type of benefit. In preparing for this reform, the Ministry of Labour and Pension Systems will rely on the SHARE data.

### Estonia

Conference “A Look at the Grey Area. Ageing From the Life-Course Perspective”



On October 29, the Estonian SHARE team from the Estonian Institute for Population Studies organized a conference for Estonian stakeholders at Tallinn University. The conference brought together policymakers, municipality leaders, as well as experts and practitioners from the broad spectrum of ageing issues in Estonia. Focusing on the role of SHARE in policymaking, SHARE Managing Direc-

<sup>1</sup> <http://www.grampcity.org/>

tor Axel Börsch-Supan gave the opening keynote speech. The conference was concluded by a panel discussion in which the Minister of Social Affairs, Tanel Kiik, the Minister of Public Administration Reform, Jaak Aab, and the representative of the Social Committee in the Parliament, Signe Riisalo discussed the main challenges of ageing in Estonia.

## Germany

### Efficiency of Pension Reforms

For the German pension commission that is tasked with the development of a sustainable pension system for 2025 and after, insights from SHARE-based research play an important role. Being a member of the commission, Managing Director Axel Börsch-Supan uses SHARE data as a valuable source of empiric evidence for the commission in the face of the often times heated public debate. Among other contributions, SHARE data was used to examine the efficiency of three pension reforms in Germany: one that aimed to improve how well work disability and receipt of disability insurance match, one with the goal to offer less healthy individuals a pathway to early retirement after having worked a long time in arduous jobs, and one that would provide households in risk of poverty a supplemental pension benefit<sup>2</sup>. Utilizing the linkage of SHARE survey data with official administrative records of the German statutory pension, the study is able to demonstrate that all these reforms miss their targets. Since similar reforms are debated in many other European countries as well, these case



studies may serve as examples how to better target public pension policies even beyond Germany.

## Latvia

### Research meets policy at Rīga Stradiņš University

On October 2, SHARE Estonia hosted an event at Rīga Stradiņš University to introduce SHARE to policymakers. Signe Tomson and Tiina Tambaum of SHARE Estonia as well as Andrejs Ivanovs and Antanas Kairys of the Latvian SHARE team gave insights into how SHARE data can be used by policymakers. Representatives from the Ministry of Health of the Republic of Latvia, the Ministry of Education and Science of the Republic of Latvia, the State Employment Agency, the Centre for Disease Prevention and Control and others attended the event to learn about how SHARE is coordinated and hear about real-life examples of how SHARE data can be used for policymaking.

## Luxembourg

### Calculating the national healthcare expenditures

Maria Noel Pi Alperin of the Luxembourgian SHARE team at the Luxembourg Institute of Socio-Economic Research (LISER) is currently working with the Central Bank of Luxembourg and the Luxembourg Institute of Health on a joint project. The aim of the cooperation is to compute the country's long-term projections of the healthcare and long-term care expenditures. In particular, health expenditure are



calculated by linking individual conditions to the use of medical resources (e.g. specific drug treatments, probability of surgical interventions, hospitalization). With the help of SHARE data, the researchers developed a new microsimulation model, which allows accounting for the effect of policy changes and different assumptions about the ageing process. Some of the project's results have helped the Central Bank of Luxembourg to give advice on the Law project about the Public expenditures for the financial year 2019 and the multiannual programs for the period 2018-2022 and the Law project about the Public expenditures for the financial year 2020 and the multiannual programs for the period 2019-2023. Another paper will focus on the costs of dementia.

## Switzerland

### SHARE data for national health strategies

The Swiss SHARE team cooperated with the Federal Office of Public Health. The office used SHARE data for a report on healthy aging in Switzerland<sup>3</sup>. Specifically, SHARE data allowed insights into chronic diseases, multimorbidity, health behavior (such as physical activity, smoking, drinking and weight), social activity and quality of life. The resulting report is part of the national strategy against addiction and of the national strategy for the prevention of non-communicable diseases. Furthermore, the Federal Office of Public Health considers SHARE as a data source for their future monitoring of non-professional care givers.



## ON THE EUROPEAN LEVEL

### SHARE First Results Book – Connecting Research and policy

On June 25, SHARE released its new First Results Book. “Health and socio-economic status over the life course” gives an overview of the first results of the new Wave 6 and 7 data and serves as inspiration for what kinds of research SHARE data makes possible. Bringing together actors from research and policy, the event was held at the Palais des Academies in Brussels in front of guests from universities, research institutions, think tanks, government agencies and policy institutions. After an introduction from Beatrice Lucaroni (DG Research and Innovation, European Commission), SHARE researchers presented their work with the new data while policymakers gave insights into how they use SHARE. Monika Queisser (Head of Social Policy at OECD) presented how the OECD analyses the data for their report “Preventing Ageing Unequally”, emphasizing that the “longitudinal and harmonized data of SHARE is essential to the OECD to help its member countries assess and design better ageing-related policies”. Katarina Ivanković-Knežević (Director Social Affairs at DG for Employment, Social Affairs and Inclusion, European Commission) explained how her Directorate-General employs SHARE data for policy analyses as well, such as in the “Pension Adequacy Report”, in which the European Commission regularly assesses the Member States’ pensions systems.

<sup>2</sup> <https://tinyurl.com/SHAREcasestudies>

<sup>3</sup> <https://tinyurl.com/healthyageing-pdf>

## SHARE and other surveys meet with European Commissioner Andriukaitis

Alongside other European surveys, SHARE attended a meeting titled “Using Social Science Data and Interdisciplinary Research to Help Reduce Global Health inequalities” at the European Commission in Brussels on September 13<sup>4</sup>. With the new Head of Research and Industrial Infrastructures of the Directorate-General for Research and Innovation, Adam Tyson, as well as European Commissioner for Health and Food Safety, Vytenis Andriukaitis, International Coordinator Annette Scherpenzeel represented SHARE to discuss policy implications based on academic research.

### Joint Research Centre

The Joint Research Centre (JRC), the European Commission’s science and knowledge service, used SHARE data in a study on the intergenerational transmission of education in Europe<sup>5</sup>. Looking at evidence from the World War II cohorts, the study is able to show that not only have parents who suffered war-related hardship end up with less schooling than those who did not, but also that their children have lower educational attainments than those who did not suffer the war. The authors demonstrate that the effect of parental education is stronger for mothers than for fathers and that the mother’s education has a stronger impact on daughters than on sons.

### Science Advice for Policy by European Academies (SAPEA)

SAPEA is part of the European Commission’s Scientific Advice Mechanism. Together with the Group

of Chief Scientific Advisors, it provides scientific advice to European Commissioners to support their decision-making. It also works to strengthen connections between Europe’s academies and Academy Networks, and to stimulate debate in Europe about the role of evidence in policymaking. In its report “Transforming the Future of Ageing” for the European Commission Group of Chief Scientific Advisors, SAPEA examines how public health aimed at protecting and improving the health of people and their communities can improve the prospects of current and future ageing of EU citizens. The report relies on research with SHARE data to examine the prevalence of depression across European countries<sup>6</sup>.

### ON THE GLOBAL LEVEL

#### World Health Organization

##### The Economics of Healthy and Active Ageing

In their Economics of Healthy and Active Ageing series, the WHO investigates key policy questions associated with population ageing, bringing together findings from research and country experiences. In a contribution on the effect of population ageing on the welfare state, it reviews evidence on the health and long-term care costs associated with ageing populations to better understand the expected cost pressures associated with changing age demographics. This policy brief explores how older populations can contribute meaningfully both in economic and societal terms, particularly if they are able to remain healthy and active into later life. Specifically, the WHO relies on research with SHARE data to assess disability trends among older Europeans and how these influence health expenditure developments.<sup>7</sup>



#### Country Assessment Framework for the Integrated Delivery of Long-Term Care

The WHO’s framework document “Country Assessment Framework for the Integrated Delivery of Long-Term Care” serves as guidance for design, development and reporting for assessing integrated delivery of health and social services for long-term care in countries<sup>8</sup>. For the domain “health and social needs”, SHARE serves as a data source for the assessment of integrated delivery of long-term care. Especially on the topics “Health and well-being” and “Determinants and risk factors”, the WHO relies on SHARE for empirical evidence.

#### Silver Economy Forum

Intersectoral gathering for global institutions including OECD, EU and WHO

The Silver Economy Forum is a global event that also brings in a strong EU dimension through Finland’s Presidency of the European Union<sup>9</sup>. The Forum is built on a strong and viable partnership between the public and private sectors. As an intersectoral gathering at the highest level for global and European institutions including OECD, the European Union and the World Health Organization, it represents the first-ever global business/government conference focused on policies for the silver economy.

4 <https://tinyurl.com/SocialScienceEU>  
5 <https://tinyurl.com/JRCreport>  
6 <https://www.sapea.info/topics/ageing/>  
7 <https://tinyurl.com/WHO-economics-of-ageing>

8 <https://tinyurl.com/WHO-assessment-framework>  
9 <https://silvereconomyforum.eu/event>

Furthermore, it marks a defining moment towards the WHO's launch of the Decade of Healthy Ageing, 2021-2030. In the panel discussion on "The New World of Work", Managing Director Axel Börsch-Supan presented SHARE research and discussed policy implications with fellow stakeholders from policy, business, research and civil society.

## OECD

### Health at a Glance 2019

The "Health at a Glance" report compares key indicators for population health and health system performance across OECD members, candidate and partner countries<sup>10</sup>. It highlights how countries differ in terms of the health status and health-seeking behavior of their citizens, access to and quality of health care, and the resources available for health. Alongside indicator-by-indicator analysis, it summarizes the comparative performance of countries and major trends, including how much health spending is associated with staffing, access, quality and health outcomes.

As in previous editions, the OECD relies on SHARE data for evidence on ageing and long-term care, especially to understand who the caregivers are and the share of women among them. The report also takes advantage of the harmonization of SHARE with its sister studies HRS and ELSA to compare the prevalence of informal care in Europe, the US and the UK.

<sup>10</sup> <http://www.oecd.org/health/health-at-a-glance-19991312.htm>

“We will do our most to integrate the results of this huge work into our activity, with the ultimate goal to improve the quality of life for older people and to contribute to the necessary adjustments of the social protection system.”

Ministry of Labour, Family and Social Protection /  
National Agency for Payments and Social Inspection:  
Lăcrămioara Corcheș, General Director (Romania)



Around 5% of SHARE  
Users are Policy Actors



# 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 MEETING 2019

## Member countries meet in order to discuss and adopt the scientific, operational and financial aspects of the activities of SHARE-ERIC

On 14<sup>th</sup> May 2019, the 11<sup>th</sup> SHARE-ERIC Council Meeting including a Pre-meeting with all SHARE countries took place at the Max Planck Society in Munich.

The meetings focused on the funding of future SHARE waves in times of upcoming of new framework programs and the restructuring of the EU Commission. Furthermore, attention was drawn to the outlook of SHARE in the future beyond 2024.

As a result the participating countries agreed on an increased participation in the routine costs for IT services in SHARE, while the hope was expressed that an application for an INFRADEV 3 call to the EU Commission would be successful again (the result was not yet available at the time of the Council). Furthermore, the countries stressed again the necessity of a kind of new funding mechanism taking into account the special needs of European coverage projects, like SHARE (“INFRACOV” initiative).

Finally, it was agreed on the setting up of a working group under the leadership of the German Research Ministry to launch the first steps for a continuation of SHARE-ERIC beyond 2024.



SHARE-ERIC Council at the headquarter of the Max-Planck-Society, 2019

# SHARE WAVE 8 POST-FiRe AND KICK-OFF COHESION MEETING, BUDAPEST, 2019

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

Due to the postponement of Wave 8 only one scientific meeting of SHARE took place in 2019:

This meeting was held in Budapest, Hungary from 20 September to 21 September 2019 following a SHARE user conference the day before. The meeting aimed at analyzing the SHARE Wave 8 field rehearsal outcomes and launching the new INFRADEV 3 project SHARE COHESION.

Further agenda items were a discussion on the questionnaire content of Wave 9 and 10 in the fields of Health, Health care, Employment and pensions, social networks including the new field of “cognition” in SHARE.

On the administrative level, once again one focus was laid on the necessary data protection measures in SHARE according to EU-GDPR. Regarding funding options, all countries were encouraged to explore and secure national funding for SHARE including structural funds.

The meeting was rounded off with an appreciative statement from the Scientific Monitoring Board of SHARE stressing the increasing high level of professionalism in SHARE as well as acknowledging the huge efforts to implement Wave 8 despite of a lack of funding.



Scientific SHARE meeting at the Hungarian State Treasury Social Security Headquarters, 2019

# SHARE-ERIC AND THE ERIC FORUM

## Preparing a permanent governance structure for the ERIC Forum

2019 was a very important year regarding SHARE's activities in the ERIC Forum:

SHARE took part in the ERIC Forum project Kick off meeting end of January 2019 as well as in the ERIC Forum annual meeting in Oslo in May 2019.

As work package leader of WP 2, SHARE-ERIC was supposed to develop together with all other existing 20 ERICs and future ERICs a governance model that would best fit to the cooperation between ERICs that was initiated in 2014 by the European Commission.

In the discussions – in a task force and later with all ERICs' directors during a meeting in Amsterdam in September – it was confirmed that the ERIC Forum has two main objectives:

- to enable a fruitful exchange between the ERICs and ERICs-to-be on all relevant issues related to the ERIC regulation but not restricted to it.
- to speak with one voice wherever necessary and appropriate vis-à-vis main stakeholders like the European Commission and the Member States.

In order to support these objectives of the Forum in the most effective way, so called "Rules of procedure" to implement an already existing Memorandum of understanding between all existing ERICs were finally adopted by all ERICs in the end of 2019.

Based on these new rules the ERIC Forum elected a new Chair and a Vice chair as spokesperson of the ERIC Forum supported for the first time by an Executive Board composed of all existing scientific clusters.

We are looking forward to continuing the fruitful exchange with all ERICs also in the coming years.



The ERIC Forum at its annual Forum meeting in Brussels, Febr. 2020



The new Executive Board together with the new Director, Directorate G, DG Research, Anna Panagopoulou and the State secretary at the Ministry of Science and Education of Croatia Tome Antičić

# SHARE PUBLIC RELATIONS

## Securing visibility for SHARE on all channels

Scientific research should not be confined to a small group of experts. To make the fruits of a project – especially of one like SHARE that aims to contribute to the improvement of social conditions – accessible to as many stakeholders as possible, adequate communication is necessary. To this end, SHARE keeps its various target groups informed with tailored communication measures: Offline and Online.

## Presenting SHARE’s First Results of Waves 6 & 7

On June 25, SHARE released its new First Results Book “Health and socio-economic status over the life course”, which gives an overview of the first results of the new Wave 6 and 7 data. In close cooperation with SHARE’s scientific staff, the SHARE Public Relations team developed the format and agenda of a release event, took care of the invitations and made sure it was promoted before, after and during the release. At the Palais des Academies in Brussels, SHARE researchers and high-ranking policymakers took turns in presenting research results and putting them into the context of political practice, thus enabling an interplay of research and policy. Staff from policy institutions who were interested in using SHARE data had the chance to have side meetings with colleagues from SHARE to receive consultation on how to best use the data for their use case. A professional photographer captured the event and SHARE’s website and social media reported live from the event. Following up the event, the book was mailed to European policymakers active in its field of research. In addition, a promotional card in the form of a business card was produced, designed for researcher-to-researcher exchange at conferences. This card contains a brief outline of the book as well a QR code, which leads to its open-access website.



SHARE Managing Director Axel Börsch-Supan and International Coordinator Annette Scherpenzeel at the First Results Book Release Event

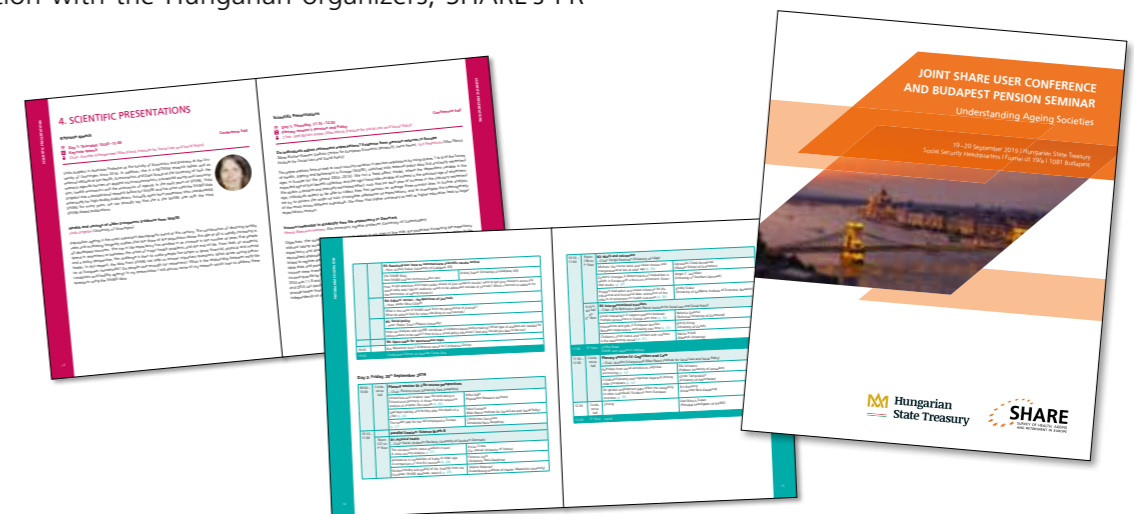


## Staying in touch with SHARE’s users

### Userconference

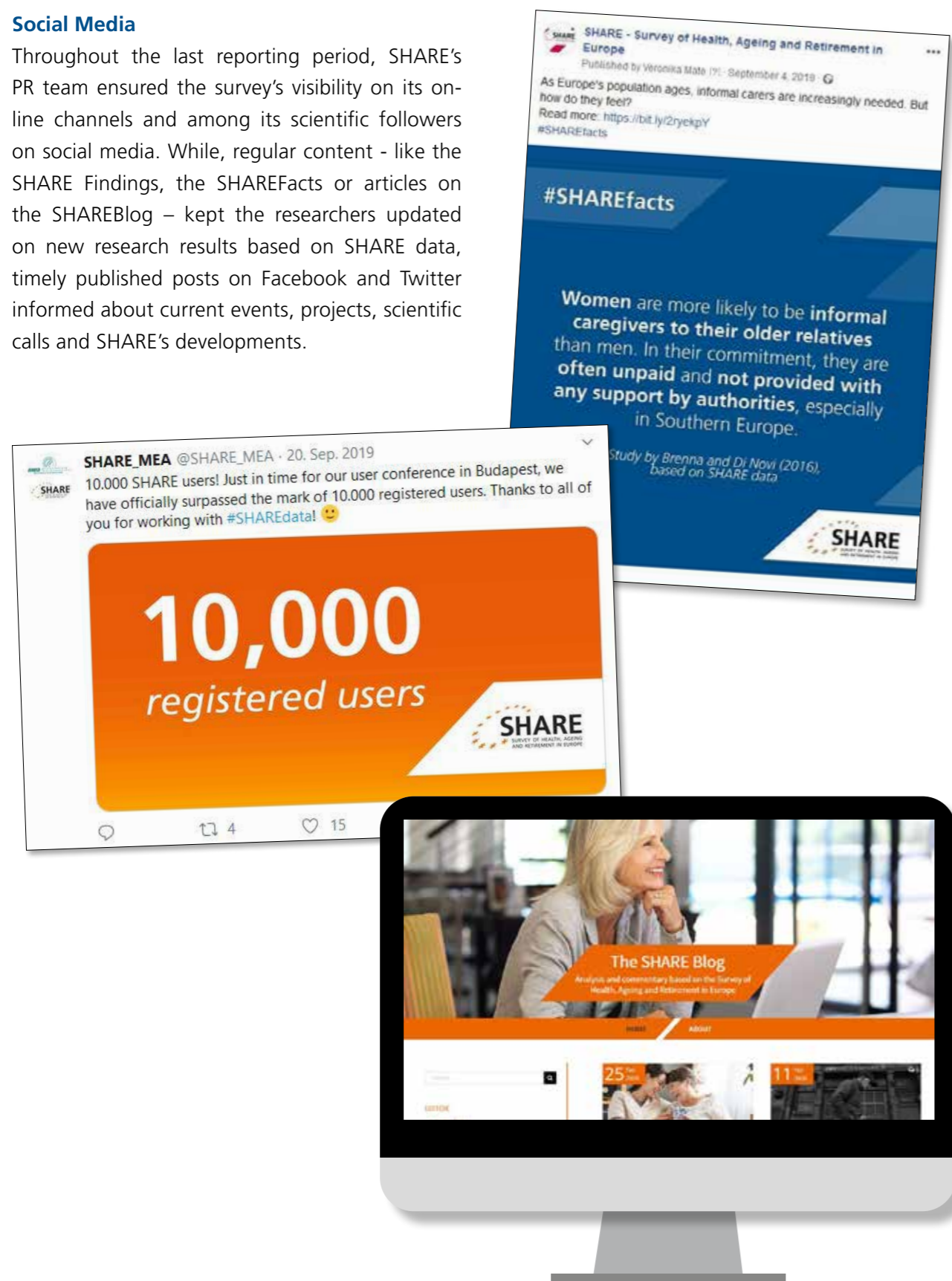
Scientific researchers worldwide are encouraged to use SHARE data for scientific purposes. To support the users’ research projects and foster exchange, SHARE’s team hosted two user conferences in Budapest/ Hungary and Cologne/ Germany in the last reporting period. In the Budapest user conference, researchers working with SHARE data presented their results to an interdisciplinary and international scientific community. In cooperation with the Hungarian organizers, SHARE’s PR

team supported the conference with specifically designed print-materials such as a conference booklet, banners, posters and further promotional material for the conference participants. These materials not only helped to ensure a professional and consistent look, but also fostered the conference’s visibility. An accompanying online reporting on SHARE’s website and its social media channels further enhanced the conference’s prominence among the research community.



**Social Media**

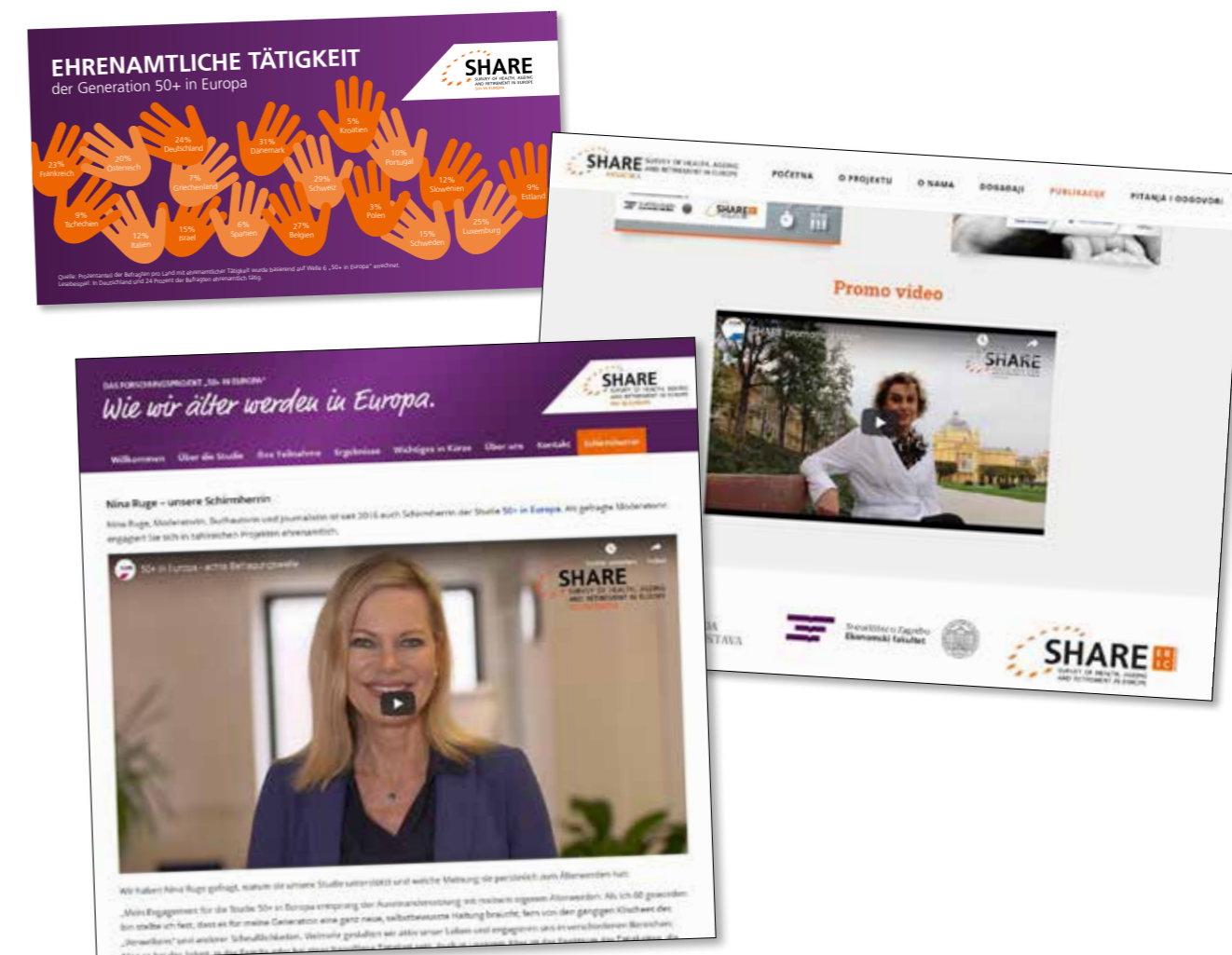
Throughout the last reporting period, SHARE’s PR team ensured the survey’s visibility on its on-line channels and among its scientific followers on social media. While, regular content - like the SHARE Findings, the SHAREfacts or articles on the SHAREBlog – kept the researchers updated on new research results based on SHARE data, timely published posts on Facebook and Twitter informed about current events, projects, scientific calls and SHARE’s developments.



**Respondent Communication**

The respondents are essential for the success of our study. To maintain their willingness to participate, SHARE’s team ensures a continuous communication between SHARE and its respondents. Due to the postponement of SHARE’s fieldwork in the last reporting period, the team had to bridge a longer gap in between two interviews. To be kept at the back of our respondents’ minds, the PR department developed additional print and online materials for communicating with our respondents, in close collaboration with SHARE’s German country team. In Spring 2019, SHARE sent out a seasonal card covering the topic “volunteering” based on SHARE data. After the central development, the card was made available for all coun-

try teams to be translated into their national languages and adapted to their needs. Further, the PR team assisted the German country team with a national testimonial project. German journalist and author Nina Ruge functions as SHARE’s testimonial helping to promote the survey among its respondents. Being 50+ as well and a former presenter of several nation-wide German TV formats she was an ideal candidate to be featured in several short clips on the German respondent site. Through these videos, she encourages SHARE’s German respondents to (again) participate in our survey. In Croatia, the national SHARE team has chosen actress and ballerina Almira Osmanović as their national testimonial.



# CONCLUSION OF THE SERISS PROJECT

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

During 2019, the three leading European Research Infrastructures in the social sciences – the Survey of Health, Ageing and Retirement in Europe (SHARE ERIC), the European Social Survey (ESS ERIC) and the Consortium of European Social Science Data Archives (CESSDA ERIC) – together with three developing research infrastructures – the Generations and Gender Programme (GGP), the European Values Study (EVS) and the WageIndicator Survey – completed the 'Synergies for Europe's Research Infrastructures in the Social Sciences' (SERISS) H2020 project. The SERISS project aimed to exploit synergies, foster collaboration and develop shared standards between Europe's social science infrastructures. This collaboration significantly helped 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. In addition, the social science research infrastructure landscape in Europe was upgraded in a way so that the field of social sciences can better serve its users. This should in turn enable users to better harness social science in addressing key societal challenges.

### SHARE's work package leading and key outputs in SERISS

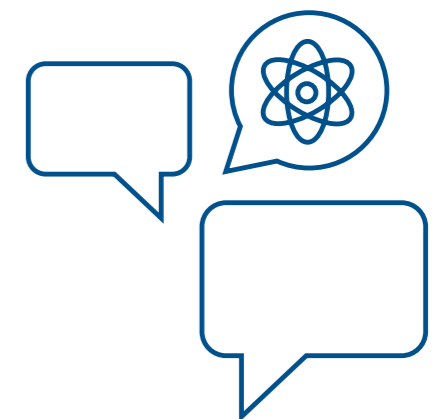
SHARE led Work Package 2 "Representing the population" as well as Work Package 8 "A coding module for socio-economic survey questions". In addition, SHARE was involved in Work Packages 3 "Maximizing equivalence through translation", 4 "Interactive tools for cross-national surveys", 5 "Training and Dissemination", 6 "New forms of data: legal, ethical and quality matters", and 7 "A survey future online? Constructing a cross-national probability based web panel system". SHARE's key outputs include, e.g.:

- mapping of all sample frames used by the major research infrastructures in Europe
- joint letter of request to improve the access to (person) registers for survey sampling
- survey inventory with more than 150 survey programs focusing on institutionalized respondents giving valuable insights into the collection of high quality data in institutions
- flexible algorithms to automate the imputation process and to compute calibrated survey weights for cross-sectional and panel data
- application of language technologies and computational linguistic methods to survey translation
- post-GDPR information sheet for respondents
- synopsis of policy-rules for collecting biomarkers in social surveys in a cross-national perspective, including an analysis of central legal requirements and ethical issues related to the collection of Dried Blood Spot (DBS) samples
- analysis of consent rates of a DBS collection in a cross-national social survey

- practical strategies for the inclusion of biological samples in population-based social survey databases and biobank policy rules in a transnational setting, taking into account all relevant data protection provisions including requirements to obtain ethics approval
- assessment of the feasibility of an inclusion of biological samples in European population-based social surveys based on 'broad consent' in accordance with the requirements of the GDPR
- programming of a web-based module to capture all required variables to measure socio-economic status across multiple platforms, using search tree navigation or semantic text matching techniques<sup>1</sup>
- cross-national databases of educational attainment and for the field of education and training to enable ISCED coding
- cross-national databases of occupation, industry and employment status to support cross-national coding of core socio-economic variables
- cross-national module to measure real life social networks

More information and other tools that are a valuable service to the wider social science community in Europe and beyond is available at the SERISS website<sup>2</sup>. Everybody interested is invited to explore the website to see if there are resources that would be helpful to use in the future. The social sciences have a critical role to play in ensuring healthy and rewarding lives for residents across Europe and beyond. Hopefully, the work of SERISS will help the field to better address those challenges going forward.

<sup>1</sup> Main repository available at [www.surveycodings.org](http://www.surveycodings.org)  
<sup>2</sup> <https://seriss.eu>



# SOCIAL SCIENCES AND HUMANITIES OPEN CLOUD

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

SHARE participates in the Social Sciences and Humanities Open Cloud (SSHOC) project, which started 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. 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.

### SHARE's work package leading and participation

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 addition to the lead in this work package, SHARE is involved in Work Packages 3 "Lifting Technologies and Services into the SSH Cloud" and 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.

### Progress in year 1 of the project

In 2019, year one of the project, the Consortium set up teams, reporting and meetings, and worked at the first milestones and deliverables in each task. Two Consortium meetings were organised in 2019, and regular virtual calls to ensure progress of each Task and Work Package. For year one, SSHOC Project managed to achieve 13 Milestones and successfully submit 13 Deliverables to the EC. SHARE delivered the Milestone 21: Protocol of laboratory processing of DBSS data in July 2019, and prepared Deliverable 5.1: Guidelines for ethics considerations in making biomedical survey data.





# 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 2019 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 2020.

## Financial Statement for SHARE-ERIC 2019

The accounting for the financial year 2019 could be closed mid-March 2020 with an audit report which found that all figures provided below (Figure 1) are in agreement with the bank accounts.

Summary		2019		
By expense/contribution type:				
Type	Code	Expenses	Contributions	Gain/Loss
<b>INITIAL BALANCE</b>				<b>2.628.845,89</b>
CC: Country Contributions acc. to Art.9	CC	0,00	2.413.771,42	2.413.771,42
GC: Grants & contracts	GC	3.295.126,07	6.282.981,51	2.987.855,44
MF: Membership fees	MF	320.000,00	380.050,00	60.050,00
II: Interest income	II	0,00	0,00	0,00
VA: VAT reimbursement	VA	0,00	46.210,80	46.210,80
PF: Participation fee	PF	20.100,00	280.200,00	260.100,00
SV: Survey costs	SV	2.701.800,16	50.100,00	-2.651.700,16
PE: Personnel costs	PE	0,00	0,00	0,00
TV: Travel costs	TV	55.348,76	0,00	-55.348,76
MA: Materials costs	MA	89.116,16	0,00	-89.116,16
AC: Account and other charges	AC	1.302,25	0,00	-1.302,25
SC: Other subcontracts	SC	1.062.335,43	0,00	-1.062.335,43
CD: Column D	CD	0,00	0,00	0,00
XX: unknown, not yet categorized	XX	0,00	0,00	0,00
<b>TOTAL FLOWS</b>		<b>7.545.128,83</b>	<b>9.453.313,73</b>	<b>1.908.184,90</b>
<b>END BALANCE</b>				<b>4.537.030,79</b>

Figure 1: Summary flow of funds in calendar year 2019

Figure 1 provides a summary of all account movements in 2019. 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 2019 for 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 and grants received in 2019, and which finance these expenses. Membership and participation are two separate types of country

contributions since 2019. The total income from these items can be found in column 5. The balance between expenses and contributions is also shown in column 5.

The positive balance is a reflection of the pre-financing requirement in the SHARE-ERIC bylaws which stipulates that expenses can only be made if the corresponding contributions have been credited. The account balance (€4.5m) is due to country contributions as well as pre-financing and final payment grant amounts which were received in 2019 for payments in 2020. This positive balance is higher than in the previous years since Wave 8 started in 2019 but final payments will be made in 2020.

Income	Amount	Amount	Y/N	Y/N
<b>Membership and Participation fees 2019</b>				
Country	Membership fee	Participation fee	M fee paid	P fee paid
AT	10.000,00 €	15.000,00 €	Y	Y
BE	10.000,00 €	19.950,00 €	Y	Y
BG	10.000,00 €	10.050,00 €	Y	Y
CH		19.950,00 €		Y
CY	10.000,00 €	10.050,00 €	Y	Y
CZ	10.000,00 €	10.050,00 €	Y	Y
DE	10.000,00 €	19.950,00 €	Y	Y
DK		15.000,00 €		Y
EE		10.050,00 €		Y
ES		19.950,00 €		Y
FI		15.000,00 €		Y
FR	10.000,00 €	19.950,00 €	N	N
GR	10.000,00 €	10.050,00 €	Y	Y
HR	10.000,00 €	10.050,00 €	Y	Y
HU	10.000,00 €	10.050,00 €	Y	Y
IL	10.000,00 €	15.000,00 €	Y	Y
IT	10.000,00 €	19.950,00 €	Y	Y
LV		10.050,00 €		N
LT		10.050,00 €		Y
LU		15.000,00 €		Y
MT		10.050,00 €		N
NL	10.000,00 €	19.950,00 €	Y	Y
PL	10.000,00 €	10.050,00 €	Y	Y
PT		10.050,00 €		N
RO		10.050,00 €		N
SE	10.000,00 €	19.950,00 €	Y	Y
SI	10.000,00 €	10.050,00 €	Y	Y
SK		10.050,00 €		N
Expected income			160.000,00 €	385.350,00 €
Actual income*			150.000,00 €	315.150,00 €
* as of 1 May 2020				
		still missing as of 1 May 2020	10.000,00 €	70.200,00 €

EU-COM 2019 Int'l Coordination ex Munich, New countries, Innovation			
SERISS	187.068,80 €		Y
SHARE-DEV3	447.985,00 €		Y
COHESION	310.214,56 €		Y
DG EMPL	475.139,00 €		Y
expected income	1.420.407,36 €		
actual income			1.420.407,36 €

EU-COM 2019 Int'l Coordination ex-Munich, New countries, innovation	
IT support routine (old GAS), innovation + new countries: CentERdata Tilburg	301.575,00 €
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 €
EU Project Coordinator MEA, Munich (DG EMPL+COHESION)	250.614,86 €
total expenditures	1.420.407,36 €
Surplus/deficit	- €

Survey contribution in 2019			
Country	Own	DG EMPL/SHAREDEV3	
AT	410.000,00 €	- €	
BE* only partially, Wallonie	- €	- €	
CZ	145.796,00 €	- €	
DE - via DFGTU	380.040,00 €	- €	
FR	463.470,00 €	- €	
GR via SHAREDEV3	12.314,69 €	92.961,14 €	
IL*	- €	- €	
IT	370.000,00 €	- €	
NL	- €	- €	
PL	- €	- €	
SE	349.325,46 €	- €	
SI	297.480,00 €	- €	
CH*	- €	- €	
BG via DG EMPL wave 7 + Part A wave 8	- €	61.814,32 €	
CY via DG EMPL wave 7 + Part A wave 8	- €	53.420,59 €	
DK*	- €	- €	
EE own/partially SHAREDEV3	69.000,00 €	46.384,50 €	
ES own/partially SHAREDEV3	248.380,74 €	167.426,72 €	
FI via DG EMPL wave 7 +Part A wave 8	- €	227.039,10 €	
HR	- €	- €	
HU	82.500,00 €	- €	
LT via DG EMPL wave 7 +Part A wave 8	- €	67.813,07 €	
LV via DG EMPL Part A wave 8	- €	77.012,10 €	
LUX*	- €	- €	
MT viaPart A wave 8	- €	41.607,07 €	
PT*partially via SHAREDEV3	- €	104.000,00 €	
SK via DG EMPL Part A W8	- €	45.139,54 €	
RO via DG EMPL wave 7 +Part A, B wave 8	- €	76.319,03 €	
total income	2.828.306,89 €	1.060.937,18 €	
		3.889.244,07 €	

Survey costs in 2019	
Country	Amount
AT	- €
BE* only partially, Wallonie	- €
CZ	- €
DE - via DFGTU	380.040,00 €
FR	163.000,00 €
GR own/via SHAREDEV3	105.275,83 €
IL*	- €
IT	228.855,00 €
NL	49.042,00 €
PL	151.800,00 €
SE	349.325,46 €
SI	- €
CH*	- €
BG	61.814,32 €
CY	53.420,59 €
DK*	- €
EE	46.384,50 €
ES	229.544,10 €
FI	227.039,10 €
HR	146.784,00 €
HU	73.200,00 €
LT	67.813,07 €
LV	77.012,10 €
LUX*	- €
MT	41.607,07 €
PT*partially via SHAREDEV3	104.000,00 €
SK	45.139,54 €
RO	76.319,03 €
total expenditures	2.677.415,71 €
Surplus/deficit	1.211.828,36 €

US-NIA grants 2019		
NIA grants		158.769,41 €
total income		158.769,41 €

Biomarker 2019	
total expenditures	158.769,41 €
Surplus/deficit	- €

\* funding not via SHARE-ERIC

Figure 2: Detailed flow of funds in calendar year 2019

Figure 2 provides more detail by country and category. Figure 2 shows the expenditures that occurred in 2019 and the related incomes. Figure 2 is defined by SHARE activities occurring in 2019, while Figure 1 above was defined by account movements in 2019. The totals differ slightly between the two figures since, on the one hand, some income arrived already in 2019 and, on the other hand, some expenses which are attributable to 2018 were invoiced only in 2019. We show the situation according to the final accounts per 31.12.2019 as of March 2020.

Several line items are worth noting. First, since Wave 8 started in 2019 (the current reporting period) but will end in 2020 (the next reporting period, Figure 3), surpluses in 2019 correspond to losses in 2020. Second, all countries have paid their membership fee for 2019 except France which is still delayed at the time of this report for administrative reasons. Third, six countries have not paid their participation fee: one country for the same administrative reason and the other five countries for lack of funds. These are countries otherwise supported by a DG EMPL grant. This imbalance was covered through remaining funds in the DEV3 grant. The resulting surplus of €225,936 will be needed to cover the expected losses in 2020. Fourth, since most countries pre-financed their survey expenses, the account show a large surplus of €1,211,828 which will be offset by the expenses in 2020.

### 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.

Since Wave 8 is not yet finished, 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, unchanged from the 2019 report. 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 and four crisis countries have been financed in 2019 again 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 2019. International coordination in Wave 8 had two components:

- ➔ First, the international coordination activities which take place at the Munich head-

quarter (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 analyses 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 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 by the EU Commission for software programming and area coordination outside of Munich).

### Financial Plan for SHARE-ERIC 2020

Figure 3 presents the financial plan for 2020 based on the known contributions as of April 2020 and expected expenditure items. As pointed out already, the fact that Wave 8 is conducted in two accounting years, starting in 2019 and ending in 2020 implies that deficits in 2020 will be covered by surpluses from 2019 (Figure 2). So far, only a fraction of the expected income has been credited on the SHARE-ERIC account. This holds in particular for the membership and participation fees in 2020. The financial plan for 2020 is therefore based on the expected fees and not those already paid.

The financial plan is separated by: income from ERIC membership and participation fees and their usage; income from EU-COM and its usage; survey contributions and costs; and the current US-NIA grants and their associated expenditures.

#### Several line items are worth noting:

1. The membership fee together with last year's surplus is expected to create a surplus of €124,379.
2. After the expiration of the DEV3 grant from the EU-COM, international coordination ex Munich (IT and software) has to be covered by the participation fee. IT and software will actually be

more expensive than planned when we set up the participation fee mainly due to the need to hire a data protection expert to fulfil the GDPR requirements, plus additional software licenses. This part of the deficit can more than be covered by last year's surplus.

3. An additional deficit will incur if the same five countries as in 2019 will be unable to pay for their participation fee. The total deficit of €186,880 could still be covered by last year's surplus, leaving an expected surplus of €39,056. However, DG EMPL has announced a new grant to cover this second part of the deficit. Since this new grant has not been signed yet, it is not accounted as income, but we have been assured by DG EMPL that the grant will be approved within the 2<sup>nd</sup> quarter of 2020. This is important since participation fees of one country should not subsidize another country.
4. The combined surplus from fees without accounting for the new DG EMPL grant but includ-

ing last year's surplus is expected to be €163,435.

5. Coordination expenses explicitly dedicated to the new and accession countries are €432,135. They are covered by two grants from DG EMPL. While the first grant has been signed and is accounted as income, we are still waiting for the signature of the second, resulting in a deficit of €145,398 in 2020. As previously mentioned, we have been assured by DG EMPL that the grant will be approved within the 2<sup>nd</sup> quarter of 2020.
6. Finally, contributions in 2020 and the surplus from 2019 cover the expected survey expenditures of € 8.152.098 with a small surplus of €175,596 for the countries' survey contributions. This surplus is related to remaining amounts of country contributions already granted for Wave 9. Countries marked by an asterisk will fund the survey directly without funds flowing through SHARE-ERIC; the respective rows are therefore empty.

Income	Amount	Amount		
<b>Membership and Participation fees 2020</b>				
<b>Country</b>	<b>Membership fee</b>	<b>Participation fee</b>	<b>M fee</b>	<b>Pfee</b>
AT	10.000,00 €	15.000,00 €	Y	Y
BE	10.000,00 €	19.950,00 €	Y	Y
BG	10.000,00 €	10.050,00 €	Y	Y
CH		19.950,00 €		Y
CY	10.000,00 €	10.050,00 €	Y	Y
CZ	10.000,00 €	10.050,00 €	Y	Y
DE	10.000,00 €	19.950,00 €	Y	Y
DK		15.000,00 €		Y
EE		10.050,00 €		Y
ES		19.950,00 €	Y	Y
FI		15.000,00 €		Y
FR	10.000,00 €	19.950,00 €	Y	Y
GR	10.000,00 €	10.050,00 €	Y	Y
HR	10.000,00 €	10.050,00 €	Y	Y
HU	10.000,00 €	10.050,00 €	Y	Y
IL	10.000,00 €	15.000,00 €	Y	Y
IT	10.000,00 €	19.950,00 €	Y	Y
LV		10.050,00 €		N
LT		10.050,00 €		Y
LU		15.000,00 €		Y
MT		10.050,00 €		N
NL	10.000,00 €	19.950,00 €	Y	Y
PL	10.000,00 €	10.050,00 €	Y	Y
PT		10.050,00 €		N
RO		10.050,00 €		N
SE	10.000,00 €	19.950,00 €	Y	Y
SI	10.000,00 €	10.050,00 €	Y	Y
SK		10.050,00 €		N
Expected income		385.350,00 €	160.000,00 €	335.100,00 €
Actual income*			20.000,00 €	54.900,00 €
* as of 1 May 2020		still missing as of 1 May 2020	140.000,00 €	280.200,00 €

Expenditure	Amount
<b>ERIC administration 2020</b>	
Account charges/transaction fees	1.200,00 €
Auditor	4.500,00 €
Budget SMB/Travel	30.000,00 €
1 FTE accountant	60.000,00 €
1 Council meeting	3.000,00 €
Travel to ERIC Committee+ESFRI Workshop	2.000,00 €
Other admin (domains)	1.400,00 €
Design and Print annual activity report	6.000,00 €
MEA-SHARE GmbH operational costs 2020	2.200,00 €
total expenditures	110.300,00 €
Surplus/deficit	49.700,00 €
Carry-over Surplus 2019	74.679,35 €
Surplus/deficit	124.379,35 €
<b>IT and software coordination services ex Munich, 2020</b>	
IT routine support: CentERdata Tilburg	421.980,00 €
Data protection expert for agency desk checks	100.000,00 €
total expenditures	521.980,00 €
Surplus/deficit	186.880,00 €
Carry-over Surplus 2019	225.936,00 €
Surplus/deficit	39.056,00 €
Surplus from fees 2020	163.435,35 €

EU-COM 2020 New countries		
DG EMPL NEW 2ND	286.737,00 €	Y
DG EMPL NEW 3RD	145.398,00 €	N
expected income	432.135,00 €	
actual income	286.737,00 €	

EU-COM 2020 Int'l Coordination ex Munich, Innovation		
COHESION	1.240.859,00 €	Y
expected income	1.240.859,00 €	
actual income	1.240.859,00 €	

Survey contribution 2020 (estimated W 8 remainder)		
Country	own	DG EMPL
AT	820.000,00 €	
BE*	- €	
CZ	175.123,00 €	
DE	1.681.400,00 €	
FR*	940.984,85 €	
GR own/via DG EMPL	19.666,67 €	207.055,00 €
IL*	- €	
IT	250.000,00 €	
NL	- €	
PL	308.200,00 €	
SE	534.573,87 €	
SI	- €	
BG via DG EMPL	- €	60.959,28 €
CH*	- €	
CY via DG EMPL	- €	76.970,00 €
DK*	- €	
EE own/DG EMPL	- €	232.101,00 €
ES own/DG EMPL	- €	211.812,00 €
FI own/DG EMPL	111.644,00 €	346.700,00 €
HR	298.016,00 €	
HU	167.500,00 €	
LT via DG EMPL	- €	186.340,40 €
LV via DG EMPL	- €	156.357,90 €
LUX*	- €	
MT via DG EMPL	- €	83.642,80 €
PT own/via DG EMPL	- €	46.375,00 €
SK via DG EMPL	- €	93.250,60 €
RO via DG EMPL	- €	107.193,97 €
expected income	5.307.108,39 €	1.808.757,95 €
		7.115.866,34 €

US-NIA grants 2020		
NIA grant	30.000,00 €	Y
NIA grant	378.000,00 €	Y
NIA grant	487.850,00 €	Y
expected income	895.850,00 €	
actual income	895.850,00 €	

EU-COM 2020 New countries	
IT support new countries: CentERdata	95.325,00 €
SHARE-ERIC subcontracts (weights, imputations, PR, N)	95.220,83 €
EU Project Coordinator MEA, Munich	241.589,00 €
total expenditures	432.134,83 €
Surplus/deficit	- 145.398,00 €

EU-COM 2020 Int'l Coordination ex Munich, Innovation	
IT support innovation: CentERdata	131.953,50 €
Economics Area: Padua	150.681,00 €
Economics Area: Venice	150.681,00 €
Health Area: Odense	206.120,00 €
Social Area: Jerusalem	113.408,50 €
Survey Mgmt/Methodology: Paris	85.264,75 €
Health Care Area: Wuppertal	99.184,50 €
SHARE-ERIC Admin: Madrid	12.696,75 €
SHARE-ERIC subcontracts (weights, imputations, PR, N)	92.500,00 €
EU Project Coordinator MEA, Munich	198.369,00 €
total expenditures	1.240.859,00 €
Surplus/deficit	- €

Survey costs 2020 (estimated W 8 remainder)	
Country	Amount
AT	820.000,00 €
BE*	- €
CZ	175.123,00 €
DE	1.681.400,00 €
FR*	1.241.455,00 €
GR own/via DG EMPL	226.721,67 €
IL*	- €
IT	228.855,00 €
NL	244.891,70 €
PL	308.200,00 €
SE	534.573,87 €
SI	314.900,00 €
BG	60.959,28 €
CH*	- €
CY	76.970,00 €
DK*	- €
EE	301.101,00 €
ES	339.926,98 €
FI	458.344,00 €
HR	298.016,00 €
HU	167.500,00 €
LT	186.340,40 €
LV	156.357,90 €
LUX*	- €
MT	83.642,80 €
PT own/via DG EMPL	46.375,00 €
SK	93.250,60 €
RO	107.193,97 €
expected expenditures	8.152.098,17 €
Expected surplus/deficit	- 1.036.231,83 €
Carry-over Surplus 2019	1.211.828,36 €
Surplus/deficit	175.596,53 €

Biomarker and cognition 2020	
DBS laboratory analyses	30.000,00 €
Biomarker material	378.000,00 €
HCAP personnel, licences	487.850,00 €
expected expenditures	895.850,00 €
Expected surplus/deficit	- €

Figure 3: Financial plan for calendar year 2020

Figure 3: Financial plan for calendar year 2020

SHARE  
SHARE  
IN  
NUM  
BERS

# SHARE IN NUM BERS

# IMPACT

### Number of Registered Users




8,891	2018: 507
in year 2018	2019: 470
10,368	Processed User Requests
in year 2019	



	Publications	SSCI-ranked Publications
2018:	2,186	672
2019:	2,630	802

### Policy Actors Using SHARE Data



2018:	434
2019:	459

### User Workshops

2018:	4
2019:	4




### Own Publications Published as Open Access

2018:	100%
2019:	100%

### European Coverage

Wave 7: 28 of 28 Countries  
Wave 8: 28 of 28 Countries



### User Countries

79	81
in year 2018	in year 2019



### European Countries covered in Publications<sup>1</sup>

around 66% of publications used 10 or more countries  
around 8% of publications used 20 or more countries

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.

<sup>1</sup> This includes publications since 2018.

## 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 policy making 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. Nikolaos 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 Arne Bethmann.

### 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. Anikó Bíró 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. Sharon Shiovitz-Ezra leads the Israeli Country Team.

### 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 policy making, 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 Chłóń-Domińczak is the Polish Country Team Leader.

### SLOVENIA

#### Institute for Economic Research Ljubljana (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, Department of Business and Economics, Odense

## **ESTONIA**

Tallinn University, Estonian Institute for Population Studies, Tallinn

## **FINLAND**

Väestöliitto, Helsinki

## **LATVIA**

Rīga Stradiņš University, Institute of Public Health, Riga

## **LITHUANIA**

Vilnius University, Faculty of Philosophy, Vilnius

## **LUXEMBOURG**

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

## **MALTA**

University of Malta, Faculty for Social Wellbeing, Malta

# OF SHARE

## **PORTUGAL**

University of Minho, Communication and Society Research Centre, Braga  
Nova University of Lisbon, Nova School of Business and Economics, Lisboa

## **ROMANIA**

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

## **SLOVAKIA**

University of Economics in Bratislava, Bratislava

## **SPAIN**

Center for Monetary and Financial Studies, Madrid  
Girona Biomedical Research Institute, Girona

## **SWITZERLAND**

University of Lausanne, Faculty of Business and Economics, Swiss Centre of expertise in the social sciences, Lausanne



## VISIT YOUR COUNTRY TEAM ONLINE:

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