

ANNUAL ACTIVITY REPORT

2023/24



SHARE-ERIC

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SHARE'S MISSION & VISION

Our Mission

SHARE, the Survey of Health, Ageing and Retirement in Europe, is a research infrastructure for studying the effects of health, social, economic, and environmental policies over the life-course of European citizens and beyond. From 2004 until 2024, 616,000 in-depth interviews with 160,000 respondents aged 50 or older from 28 European countries and Israel have been conducted.

SHARE is the largest pan-European social science panel study providing internationally comparable longitudinal micro data, which allows insights in the fields of public health and socio-economic living conditions of European individuals, both for scientists and policy makers.

SHARE is the ideal database to study the non-intended socio-economic and health consequences of the epidemiological containment decisions and the long-term effects of the COVID-19 pandemic due to its life-course and multidisciplinary approach combining health with socio-economic data.

SHARE has global impact since it not only covers all EU member countries in a strictly harmonised way but additionally is embedded in a network of sister studies all over the world, from the Americas to Eastern Asia, now also expanding to Africa.

SHARE

Empowers decision makers to make data-driven decisions by providing world-class research and data to researchers on how people respond to a changing world.

Our Vision

How do people respond to a changing world?

Life expectancy increases. With this positive development, new questions and challenges arise. How can national social systems cope with the increasing demands, e. g. on pensions and on social security? How can the time spent in older age be spent happily, healthy, economically stable, and socially active? And how do people 50+ cope with everchanging health risks such as caused by the recent COVID-19 pandemic?

Longitudinal data, such as the SHARE data, allow for cross-country comparisons and research with a lifecycle perspective that is needed to investigate how people cope with a changing world. SHARE will expand collaboration and research projects particularly in the following areas:

“Baby Boomer Retirement, Silver Economy and Digitalization”, “Health prevention and maintenance in an aging world”, “Flexible elderly care”, and “Growing inequalities”.



SHARE's scientific aim is to stay a world leader in harmonizing international surveys and strengthen its connections in a global network of similar surveys. To achieve this, SHARE focuses on methodological innovations: multi-mode interviews, flexible frequency, objective data, and links to process data.

With the establishment of the SHARE BERLIN Institute, SHARE evolved scientifically through new partnerships and scientific concepts, while remaining true to its unique selling point: SHARE's fundamental structure as a panel as well as its multidisciplinary and international design.

SHARE's vision is to help improve people's lives by providing world-class research and data on how people respond to a changing world.



FOREWORD FROM THE CHAIR

Welcome to the 12th SHARE-ERIC Annual Activity Report which provides detailed insights into the scientific achievements, operational activities and financial aspects of SHARE-ERIC in 2023.

Over the past year, our consortium has continued to promote collaboration and scientific progress for the benefit of all. This would not have been possible without the continued support of the member states of the SHARE-ERIC consortium as well all countries which participate in the survey. I am grateful for the contribution and work done in 2023 by everyone involved at all levels. It is the sum of everyone's individual contribution that enables SHARE to maintain scientific excellence as a leading research infrastructure in the social sciences and to continue making a meaningful impact in our society. Our collective effort to achieve these goals is even more important today as Europe and the world face ever more complex challenges.

SHARE is currently in a period of transition: Following its establishment in 2022, the new SHARE Berlin Institute (SBI) has officially assumed the role as new host institution of the central coordination of SHARE infrastructure (SHARE Central). I thank the International Coordinator of SHARE-ERIC and head of the SBI, Prof. David Richter, as well as everyone at the SBI for their continued efforts over the last year and their commitment to building a solid foundation for the long-term future of SHARE. There were also changes in the SHARE-ERIC Management Board: Agnieszka Chłoń-Domińczak was appointed Deputy Managing Director of SHARE-ERIC, a decision the Council acknowledged at the 16th SHARE-ERIC Council Meeting in June 2023. In November 2023, the Council endorsed Agnieszka as acting Managing Director of SHARE-ERIC. I congratulate Agnieszka once more on her new position and, more importantly, thank her for her readiness to assume responsibility as acting Managing Director of SHARE-ERIC during this challenging transitional period.

Lastly, and sadly, all the challenges of 2023 look almost insignificant compared to the tragic loss of Joris Voskuilen who unexpectedly passed away on January 5th 2024. Joris had represented the Netherlands on the SHARE-ERIC Council since 2018. He was highly valued for his commitment to the advancement of SHARE, his profound insight and experience as well as, not least, his humour and personality. He will be remembered fondly by everyone in the SHARE family.



Dr. Sandro Holzheimer
SHARE-ERIC Chair

A handwritten signature in black ink, appearing to read 'Sandro Holzheimer', followed by a long horizontal line.



FOREWORD FROM THE MANAGING DIRECTOR

The year 2023 was a year of transition as well as continuation. Continuation, because we could return to collect the Wave 9 data in the usual fashion. Transition, because it was much harder to recruit both respondents and interviewers, who were more reluctant than ever to have face-to-face interviews. These developments confirm that we need to push ahead with “SHARE 2.0” that will contain more flexible digital survey methods.

2023 was also important for SHARE’s organisational transition. In an important milestone, the international coordination of SHARE – the machine room, which internationally coordinates and executes the scientific and operational activities of SHARE – moved to the SHARE BERLIN Institute. In this new structure, we are preparing the main data collection of Wave 10 for the autumn of 2024.

SHARE-ERIC also faced an important transition: Agnieszka Chłoń-Domińczak, Deputy Managing Director of SHARE, assumed the role of Acting Managing Director, while Axel Börsch-Supan reduced his role to supervise the financial and legal integrity of SHARE-ERIC. The financial management of SHARE was set up at the SHARE-ERIC to ensure the compliance with standards in financial oversight and management. An important step towards the final transition was to launch a deep revision of the SHARE-ERIC statutes to reflect the growing experience of ERICs in Europe and the changing needs of SHARE. A major challenge for SHARE is to attract funding. Funding from the national governments (“participation fee”) and the German government for the international coordination was an essential anchor for the stability of the SHARE-ERIC. Grants have been another important source of funding. The outgoing managing director has raised more than 150 million Euro in EU, US and German grants, an effort that needs to be continued as all current grants expire in 2024. New initiatives, such as the SoGreen project focusing on social aspects of the green transition, prepared jointly with other social surveys: European Social Survey, Generations and Gender Survey and GUIDE - Growing Up in Digital Europe should not only generate funds but also exciting scientific insights.

These multiple transitions required a lot of commitment and endurance from everybody. We would like to thank all our friends and supporters: the EU Commission with DG Research and DG Employment, the German ministry of education and research, and the central coordination team and the financial team at SHARE-ERIC in spite of the hardships of transition. Our continuous gratitude goes to the 28 country teams. They are the foundation of SHARE. Meetings in Iasi and Bratislava and the SHARE users’ conference in Bled were valuable opportunities to meet in person, gain new energy and new ideas, and discuss jointly our priorities and future developments.

Both of us want to stress that SHARE is a genuinely European project. During the 20 years of the outgoing managing director’s watch, SHARE became a robust research infrastructure and the largest pan-European social panel study. SHARE serves an ever-increasing community of users now at more than 18,000 researchers from 89 countries. The strict harmonization across Europe is a huge asset that does not only contribute to science but also to policy insights at international and national levels.



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



Prof. dr hab. Agnieszka Chłoń-Domińczak, Ph.D.,
Acting Managing Director of SHARE-ERIC

SHARE BERLIN INSTITUTE

Vision & Mission

Our vision is to serve as the central research and infrastructure hub of SHARE and to position the SHARE BERLIN Institute (SBI) as a leading research force in ageing within Berlin's academic community.

Our mission is to understand the dynamic interplay between individuals and their contexts throughout the life course. We want to explore how biological, economic, environmental, and social factors shape who older Europeans are and how older Europeans age. We believe in excellent data for excellent research and provide rich, high-quality, multidisciplinary data that empowers researchers and policymakers to improve policies and to enhance the individual well-being of all Europeans.

We strive to push the state-of-the-art in research methods and data collection technologies to ensure our data is accurate, accessible, reliable, and relevant. We aim to foster collaboration between the SHARE stakeholders in the EU member countries and in Berlin by providing the platform for joint research initiatives, guided by a commitment to an open science framework and the integrity of our work.



David Richter,
Director SHARE Infrastructure



Sylvia Becker,
Commercial Managing Director

Activities of 2023

The activities of the SHARE BERLIN Institute (SBI) over the past year reflect a concerted effort to build the central research and infrastructure hub of SHARE while advancing research on ageing within Berlin's academic community.

Key highlights include designing the framework for the data collections of SHARE 2.0 to stay flexible in the response to evolving research needs, ensuring our data remains relevant and impactful (chapter 2 of this report). An example of this is a new module to measure the internet use among older people. This module was developed in collaboration with experts in the field and is based on extensive qualitative pretest interviews. To prepare for the multi-mode future of SHARE 2.0, the previous concept of two test runs has been adapted to reduce the burden on the survey agencies, while at the same time allowing for proper testing of the technical set-up. A blended learning approach, using an online wiki, short videos, and animations, enriched the training and allowed for more transparency and better information seeking.

The internal release of SHARE wave 9 data underscores our mission's focus on **providing excellent data for excellent research**. Updates to the methodology and the addition of new variables make our data more comprehensive and user-friendly. The initiation of online webinars

through the SHARE International Seminar Series (SISS) further facilitated knowledge exchange and promoted cutting-edge research which is aligned with our commitment to advancing research methods (chapter 5.4 of this report).

We are dedicated to empowering researchers with the skills to utilize SHARE data effectively. In 2023, hosting the SHARE Germany user workshop and providing a platform for SHARE-affiliated researchers to publish their results through the SHARE Working Papers Series has underscored this dedication.

Our engagement with external networks, such as the Gateway to Global Aging Data network, demonstrates our commitment to promoting international collaboration and data harmonization.

Through networking with academic institutions and hosting events like the SHARE stakeholder conference as well as supporting international formats like the annual conference of the European Survey Research Association (ESRA), we foster collaboration and the exchange of ideas on common challenges related to ageing research.

Overall, our activities reflect our dedication to advancing ageing research by providing high-quality data, fostering collaboration, and building robust infrastructure.

WHAT IS SHARE?

The Survey of Health, Ageing and Retirement in Europe

With the growing ageing population in Europe, well-founded evaluation of the effects of health, social, economic, and environmental policies on the lives of European citizens becomes ever more important. To meet this challenge, excellent scientific research based on excellent data 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 9, the latest wave of data collection, SHARE has conducted around 616,000 in-depth interviews with 160,000 respondents. In general, 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 as well as blood-based biomarkers and an extensive measurement of cognition. Additionally, in the course of the COVID-19 pandemic, SHARE has conducted two Corona Surveys with telephone interviews. Thus, SHARE is the largest pan-European social science panel study providing internationally comparable longitudinal micro data, which allows insights in the fields of public health and socio-economic living conditions of European individuals, both for scientists and policy makers.

Research on a Global Scale

SHARE operates in all 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, enabling comparative research on a truly global scale.

Exploiting Europe's "Natural Observatory"

With the help of SHARE data, researchers can provide a better understanding of how individuals and families are affected by various policy decisions. The survey exploits Europe's institutional, economic, social, and cultural diversity as a "natural observatory" to investigate the impact of policy decisions. In particular, it analyses the second half of the life cycle and brings together many scientific disciplines, including demography, economics, epidemiology, psychology, sociology, medicine, biology and statistics. SHARE's special datasets include retrospective data on the respondents' entire life course, the linkage of survey data with institutional pension information, objective health measures like biomarkers and accelerometer data, or a simplified dataset for training and teaching purposes. The data are available to all qualifying researchers around the globe free of charge.

Deep understanding of crisis effects and challenges

Be it the financial crisis of 2008 or the global pandemic of 2020: SHARE is an excellent tool to research and understand the effects of crises and societal challenges in Europe and beyond. With the outbreak of the COVID-19 pandemic, SHARE has become even more important as a tool for evidence-based policy making. It offers the ideal infrastructure to study the non-intended socio-economic and health consequences of the epidemiological containment decisions and the long-term effects of the COVID-19

pandemic due to its life-course and multidisciplinary approach. These synergies have been pooled in the SHARE-COVID19 research project, funded by Horizon 2020 and the Coronavirus Global Response.

SHARE-ERIC

SHARE has become a major pillar of the European Research Area, culminating in SHARE's elevation to ESFRI-landmark status in 2016, ten years after its selection as one of the projects to be implemented by the European Strategy Forum on Research Infrastructures (ESFRI) in 2006. In March 2011, SHARE was given a new legal status as the first ever European Research Infrastructure Consortium (ERIC). SHARE-ERIC is a legal body under European law, which is a great advantage for funding and procuring SHARE's survey activities.

Central Coordination

Until 2023, SHARE was centrally coordinated in close cooperation with the Max Planck Society. About 44 people have worked in the SHARE central office in Munich at the end of 2022, taking care of the Database Management, Questionnaire Development, Survey Methodology, Operations, and the various research projects of SHARE. They are complemented by the Financial Affairs, European Relations and International Management, and Public 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. As of 1.1.2023, the SHARE central office has been relocated to its new home in Berlin, the SHARE BERLIN Institute. The SHARE BERLIN Institute is managed by Prof.

Dr. David Richter, Director SHARE Infrastructure and International Coordinator of SHARE, and the commercial manager Sylvia Becker. Until the end of 2024, the seat of SHARE-ERIC remains in Munich.

Area Coordination

SHARE's multidisciplinary 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 Martina Brandt (TU Dortmund University, Germany) 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.

SHARE 2.0

With significant societal and technological changes over the last two decades, the SHARE project has evolved to meet new challenges and opportunities. The updated SHARE 2.0 framework emphasizes flexibility and adaptability and includes mixed-mode survey designs, resilience against declining response rates, and the integration of diverse data sources such as wearables and administrative records. It further supports a comprehensive research agenda focusing on four key areas: the retirement of the baby-boom generation and digitalization, disease prevention and health maintenance, sustainable old-age care, and rising inequality in income, wealth, and health. These priorities will guide the collection of high-quality data to support scientific research and evidence-based policy making.

SHARE 2.0

With significant societal and technological changes over the last two decades, it's time for us to adapt and innovate even more than before. The evolving SHARE 2.0 framework and lessons from the pandemic stimulated a significant update to the methodology. While maintaining a stable core questionnaire, SHARE aims to enhance flexibility for rapid adaptation to a changing survey landscape.

After outlining the research agenda in the 2020 position paper "The Future of SHARE: Research and Methodology", we further advanced our work in 2023 with a second position paper titled "SHARE 2.0 Data Collection and Infrastructure". In this recent paper, we designed the framework for SHARE 2.0 data collections and consolidated ideas that had been evolving over the past few years.

Here's how our approach aligns with the new SHARE 2.0 framework:

Embracing Flexibility in a Changing Research Landscape:

The SHARE 2.0 framework emphasizes flexibility, together with a higher frequency of surveys, to swiftly respond to evolving research needs. The recent pandemic forced us to work under extraordinary circumstances. Although it was highly challenging, we appreciated the value of being flexible and quick in our operations to be able to survey societal changes in a timely matter. We are ready to adapt, ensuring our data remains relevant and impactful.



Efficiency Through Mixed-Mode Approaches:

We are moving towards a mixed-mode approach to enhance efficiency and cost-effectiveness. In this respect, mixed-mode survey designs offer benefits in terms of improved coverage, reduced non-response, lower costs, and reduced interviewer bias. By integrating various data collection modes (e.g. CAPI, CAWI, and CATI), we aim to optimize resources without compromising quality.



Resilience Against Declining Response Rates:

Addressing the challenge of declining response rates, we are redesigning survey modes to take respondents' preferences into account. By offering more convenient and private modes, such as web-based surveys or self-administered paper questionnaires, researchers can increase inclusivity and meet the needs of diverse respondents. For example, online surveys may be particularly suitable for working people who are comfortable with digital devices, while retired people may prefer the familiarity and ease of paper questionnaires. On the other hand, face-to-face interviews with human interaction between respondents and (known) interviewers may be beneficial for older and/or cognitively impaired respondents, and thus an efficient use of resources for this particular group. With this in mind, SHARE 2.0 takes a dual approach, complementing a more respondent-centered survey design with an enhanced role for interviewers with the ultimate goal to foster engagement and participation while maintaining data integrity.



Inclusivity of Additional Data Sources:

SHARE 2.0 is not just about surveys – it is about embracing diverse data sources. We are keeping on exploring new avenues such as new devices (e.g. wearables), biomarkers, and process-generated data to enrich our data and to provide new opportunities for the scientific community. In addition, we will increase our efforts regarding data linkage with administrative data, such as pension or health data to include linked data for more countries.



Commitment to Data Quality and Harmonization:

Amidst these changes, we remain fully committed to deliver top-tier data quality. We prioritize panel continuity and harmonization across all SHARE countries, ensuring consistency and reliability for our users.



In practical terms, respondents will maintain the tradition of face-to-face interviews every two years, supplemented by an online-first survey with phone backup during interim periods between waves. SHARE also plans to support an additional project each wave, utilizing flexible data collection methods to be at the forefront of both substantive and methodological research. To enhance survey efficiency, we will implement a new questionnaire software to seamlessly transition between survey modes and establish centralized sample management, ensuring secure and efficient access for survey agencies while upholding data protection standards. Introducing a “rolling preload” system with continuously synchronised and up to date preload data will expedite data input from prior interviews into subsequent surveys to reduce respondent’s burden and interview time. Furthermore, we aim to streamline procurement processes by treating main and interim surveys as a unified entity and developing framework contracts to facilitate efficient and continuous procurements for future survey waves, optimizing data collection processes and resource allocation.

SHARE is adapting its research agenda. As we prepare the infrastructure, we continue to organize the adaption of SHARE’s research agenda to a situation in which the baby-boom generation is retiring, health risks are becoming more apparent despite medical advances, and the costs of long-term care are looming in the future. Based on these developments, the research agenda is based on four priorities:



Retirement of the baby-boomers, the silver economy, and digitalization

The analysis of the social situation and behavior of retired baby boomers, who will shape the digitalized “silver economy” will include subtopics such as the (flexible) extension of the retirement age and its consequences for inequalities in late working age, early retirement and pension systems in

Europe, the digitalization of services and the workplace, lifelong learning, as well as intergenerational support to facilitate the reconciliation of family life and employment.



Disease prevention and maintenance of health in an ageing world threatened by new infections and chronic diseases

This research area includes subtopics such as the origins of civilization diseases across the life course, healthy ageing, multimorbidity, and social determinants of inequalities in health and mortality, using combinations of objective and self-reported health data. An overarching theme will be prevention and resilience, in particular resilience in cognitive ageing, physical activity and nutrition, the emerging role of e-health, and the threat of epidemics of infectious and other diseases.



Sustainable old-age care

This area includes research on the organization of care in old age, formal, informal and distance home care. An important focus will be on preventing the need for care. Topics to be studied will include the health and morbidity of caregivers, the consequences of long-term care for their labor market outcomes and income trajectories, and how informal caregivers and care recipients cope with crisis situations such as the recent pandemic. Comparative analyses of SHARE data in microsimulation models will shed light on the financial sustainability of health and long-term care systems in Europe.



Rising inequality in income, wealth, and health

Societal inequalities in income, wealth and health and their interactions over the life course are the subject of the fourth priority area of SHARE 2.0. Some specific topics will be the long-term

non-monetary returns to education and their impact on income and wealth inequalities, the impact of critical life events (e.g. loss of a partner, health shocks, disability, unemployment, retirement) on health and economic inequalities, and the social and health situation of older migrants. Finally, SHARE will monitor the extent to which emerging crises, such as a new pandemic, economic or environmental threats, will contribute to social, health and economic inequalities.

The integration of these priorities will be organized in a comprehensive process. In 2023, we already outlined the SHARE 2.0 procedures for the “new content selection process”, ensuring continued inclusivity and transparency. This chosen path will be continued. It will allow to collect comprehensive, high-quality data that accurately reflect the complexity of SHARE’s research objectives to support excellence in science and evidence-based policy making.



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 the past year

- Release 9.0.0 preparation:** In 2023, the SHARE DBM-Team prepared the release of SHARE wave 9 data. A set of data cleaning processes ensured the provision of harmonised and consistent data to enable country-comparative and longitudinal analysis. Two Operator Meetings were organised to train Country Team Operators (CTOs) and Area Team Operators (ATOs) – one took place in Iasi (Romania) and one took place in Bratislava (Slovakia). Several innovations were established, e. g. a stable child identifier variable that makes it possible to link children across waves. (pp. 26–27)
- Software development – a set up for the future:** Progress in software development fostered an efficiency and adaptability increase of the SHARE survey in 2023. A collaborative journey with the software programmers at Centerdata led to significant innovations in the contact management and in the questionnaire software of SHARE. The adoption of Agile project management practices, such as SCRUM, has advanced work processes, e. g. by minimising the risk of rework and ensuring the alignment of objectives. (p. 28)
- Preparations for data collection of Wave 10 – Innovations for the future:** With the suggestion of short intervals between surveys in the position paper “SHARE 2.0 Data Collection and Infrastructure”, pretesting measures are adapted. While pretests will be a joint effort of SHARE Central and the country teams without the inclusion of survey agencies, the field rehearsal will retain its comprehensive nature. Train-the-trainer and interviewer training procedures will be revised to a blended learning approach. Wave 10 trainings were conducted in the described ways. (pp. 29–30)
- The life situation of the senior population during the pandemic:** In October 2023, the First Results Book (FRB) entitled “Social, health, and economic impacts of the COVID-19 pandemic and the epidemiological control measures. First results from SHARE Corona Waves 1 and 2” was published by DeGruyter. In 32 chapters, the book outlines key results of the SHARE-COVID19 project. The chapter 3.1.4 presents selected research findings out of a considerable number of publications that has been released using Corona Wave 1 data and Corona Wave 2 data. (pp. 31–34)
- Record Linkage in SHARE:** SHARE encourages record linking projects – the linkage of survey data with administrative data. Currently, linkage projects with SHARE data are ongoing in eight SHARE countries. During the reporting period, preparations were made for the collection of linkage consents for Wave 10. Two new linkage projects were prepared – one in Germany and one in Austria. Moreover, the chapter 3.1.5 presents research findings based on record linkage in Denmark. (p. 35)
- Health Measurements in SHARE:** Objective health measures have been an important part of SHARE. To measure the physical activity of SHARE respondents, a study using **accelerometers** was conducted in the eighth survey wave. In 2023, a special data collection was conducted to validate the SHARE data, aiming to ensure that the detection of postures and activities with the SHARE sensor data lead to valid results. Furthermore, the Collaboration in the Prospective Physical Activity, Sitting and Sleep Consortium (ProPASS) was continued. (pp. 36–37)
- The SHARE Harmonized Cognitive Assessment Protocol (SHARE-HCAP)** whose data collection ended in November 2022 encompasses data from more than 2,600 respondents in the Czech Republic, Denmark, France, Germany, and Italy. Since then, the team has been working on data cleaning and integration of this study with the longitudinal SHARE datasets. However, more work on the SHARE-HCAP raw data needs to be done. Furthermore, the SHARE-HCAP team has worked on classification algorithms and stayed well-connected with other HCAP studies in the world. (pp. 37–38)
- The SHARE Biomarker Project** has released the assay results from seven routine biomarkers with an extensive documentation. The biomarkers were compared to the values of the sister studies HRS and ELSA. Also, further validity tests were conducted. The much debated “HbA1c puzzle” was resolved by using a new assay and a different analysing instrument. The release document was published on the project website. Validity checks for less conventional biomarkers are underway. (p. 39)
- SPLASH:** The “Social PoLicy Archive for SHARE” (SPLASH) aims to foster comparative policy-oriented research using SHARE microdata. In 2023, a comprehensive evaluation of data on COVID-19-related Short-Time Employment Aid (STEA) policies and instruments was carried out, resulting in the revision of more than 400 measures, a testament to the commitment to data accuracy and reliability. Methodological changes influenced the update of the quantitative database, and the SPLASH online platform has undergone a major system update. (pp. 40–41)
- SHARE Users:** By the end of 2023, SHARE had more than 18,400 registered users from all over the world. With more than 2,300 new registrations in 2023, both the total number of registered SHARE users and the annual number of new registrations have reached an all-time high. While the highest number of registrations within Europe can be found in Germany (more than 3,500 registered users), the USA hosts the highest number of SHARE users outside of Europe (more than 1,000 registered users). (pp. 42–49)
- Conferences and User Workshops:** Throughout 2023, the SHARE country teams organized various events and workshops to expand SHARE’s user community and enhance its scientific impact. Workshops were held in Slovenia, France, Croatia, Israel, Austria, Bulgaria, Switzerland, Slovakia, Lithuania, and Latvia, among others. (pp. 44–46)
- User Support Activities:** The SHARE central team at SBI supports SHARE users, new and established, with documentation files and tools, by answering user requests via E-Mail, and by hosting workshops and training sessions. In 2023, meta data and documentation files were updated, and the SHARE user support team answered more than 450 user requests. Additionally, a SHARE user workshop took place in Berlin, Germany. Further workshops were held in Vienna, Austria and Helsinki, Finland and the Italian country team invited to the Summer Institute of Ageing in Venice, Italy. (p. 47)

RELEASE 9.0.0 PREPARATION

Ensuring harmonised and consistent data

The aim of the data cleaning process is to ensure harmonised, consistent, and correct data that serve as the basis for the scientific release and the longitudinal preload. To achieve this, the Data Base Management (DBM) team of SHARE Central compares different data sources of the current fieldwork with information from previous waves (if available) to identify inconsistencies, e.g. concerning IDs, gender or year of birth. Such inconsistencies are documented in so-called “check files” that are prepared by the DBM team and sent out to the Country Team Operators (CTO). The CTOs work on the files and then send the corrected check files back to the DBM team, who reviews each file and implements the necessary corrections in the data. Of course, CTOs need to be trained in those procedures – especially the new ones. Therefore, the DBM team organises one-day Operators Meetings that are usually attached to each regular SHARE meeting. In 2023, two Operators Meetings were organised by the DBM team in close cooperation with the Questionnaire Development and the Operations departments of SHARE Central: one took place in Iași (Romania) in spring and another one in Bratislava (Slovakia) in fall.

A new achievement of Release 9.0.0 will be that users will be able to link children across waves due to a stable child identifier variable. To make this possible, the DBM team generated a children check file for each country of each wave. These children check files contain specific characteristics of each child whereby

inconsistencies between waves and duplicates are marked. If children have already been mentioned in a previous wave and there are no inconsistencies, they will receive the same ID as in the previous waves. If children were not mentioned before, e.g. because a new partner moved in, they will be given a new ID. In 2023, the DBM team generated those children check files, sent them to the CTOs, and received corrected versions back. These files were reviewed, and the corrections were implemented in the data. In addition to linking children across waves, the DBM team worked on check files for linking children to information in the social network module. Furthermore, another new identifier variable will allow the linkage of interviewers across waves who play a crucial role during the entire data collection process.

Another important part of the release preparation process is to run different programs over the raw data files. This concerns for example the labels of variables, the format of dummy variables, and the coding of open answers for which close cooperation with the CTOs is essential. Those programs ensure a comparable and consistent data format. Country-comparative and longitudinal analyses are only possible if the data format is consistent across countries and waves. In 2023, members of the DBM team started working on those programs that will be finished shortly before the data release in spring 2024.

Furthermore, the preparation of releases comprises the generation of ‘generated modules’. To assure an easy and fast entry into cross-national data and high convenience while working with the data, certain variables are readily provided for the SHARE users, like the International Standard Classification of Education (ISCED). Besides internationally standardized variables, there is a range of further generated modules provided to the users that ease or enhance working with the SHARE data. Examples

are physical health measures like IADL (instrumental activities of daily living), mental health measures like the Euro-D depression scale, an index measuring social integration, and many more. Also, weights (both cross-sectional and longitudinal) as well as imputations are provided to users in the form of generated modules. In the course of 2023, the DBM team also began working on those modules that will be included in Release 9.0.0 of Waves 1 to 9.



SOFTWARE DEVELOPMENT – A SET UP FOR THE FUTURE

In 2023, SHARE embarked on a collaborative journey with the software programmers at Centerdata to enhance our survey software. This effort led to significant innovations in both the Case CTRL, responsible for contact management, and the questionnaire software, utilizing a more flexible programming language called Quest.

The Case CTRL underwent a transformation, introducing a more user-friendly interface and an individual address collector feature. This innovation empowers interviewers to update individual information before conducting main interviews, streamlining the data collection process. Additionally, the integration of refusals and delete requests ensures efficient data management.

Meanwhile, the adoption of the Quest programming language for the End-of-Life questionnaire marked a pivotal shift. It was a step toward the adoption of Quest also for the main questionnaire that will take place in Wave 11.

Furthermore, we embraced Agile principles to revolutionize our collaboration methods, recognizing

their effectiveness beyond the software industry. Agile project management practices, such as SCRUM, were seamlessly integrated into SHARE's workflow, enabling us to navigate the dynamic nature and complexity of survey projects with agility.

SCRUM methodology facilitated a structured approach to requirement analysis, conceptual development, and software product management. Through the establishment of Product Teams and Scrum Teams, SHARE Central and the development team at Centerdata collaborated closely in Sprint cycles. This collaborative framework fostered iterative exploration of requirements and incremental implementation, minimizing the risk of rework and ensuring alignment with project objectives.

In essence, our journey towards software innovation and Agile adoption has not only transformed our survey processes but also empowered us to navigate the ever-evolving landscape of survey projects with efficiency and adaptability.

PREPARATIONS FOR DATA COLLECTION OF WAVE 10 – INNOVATIONS FOR THE FUTURE

The possibility to have short intervals between surveys as it is suggested in the position paper "SHARE 2.0 Data Collection and Infrastructure" (see chapter 2) will also have an impact on the way in which pre-testing is carried out. A two-stage approach (i.e. pretest and field rehearsal) will no longer be feasible due to the significant overlap between the life cycles of, for example, the main survey and the in-between survey. Instead, we will use a combination of a simpler pretest carried out by the country teams with a single full field rehearsal. This should be supported by additional testing during questionnaire development (e.g. translatability assessments and qualitative pretest interviews). In addition to pre-testing, our interviewer training and train-the-trainer procedures will also be revised, making greater use of self-learning and online tools.

Conducting pre-tests plays a vital role in refining processes and mitigating potential problems associated with the interviewer software. In previous waves, our pre-collection testing involves two extensive test runs: the pretest and the field rehearsal. However, the introduction of in-between surveys presents the challenge of effectively doubling the workload for these test runs, given existing protocols. To ensure that the burden of pretesting remains manageable, we will do a strategic adjustment. Specifically, we will orchestrate a test run that excludes the participation

of survey agencies. Under this framework, the pretest would be managed jointly by SHARE Central and the country teams. Meanwhile, the field rehearsal will retain its comprehensive nature, with the active participation of the survey agencies, in line with our established practice.

We also evaluated and improved the format of the Train-the-Trainer meetings (TTTs). For future training after wave 10, we propose a more effective approach that integrates a variety of resources, both offline and online, to meet different learning preferences, optimise knowledge retention and make more efficient use of the resources of the SHARE Central team. This approach combines offline documentation, wikis, manuals, video training and a strategic mix of online and in-person training. The time and number of in-person meetings will be kept to a minimum. By adapting the TTT's format, we are able to provide an enriched knowledge transfer. As well as facilitating a broader dissemination of knowledge, this change will also streamline our operations at SHARE Central by optimising the arrangement of recurring tasks. However, the core of the TTT training program will stay: it conveys all technical, logistical and managerial aspects of successful fieldwork to the participants, who are representatives of the involved survey agencies (country teams for the pretest) and who are instructed to then pass on the obtained

information to their interviewers during National Training Sessions in the respective countries. Elements of this strategy have already been evaluated as part of the wave 10 pretest.

In order to prepare all participating countries for the main fieldwork of Wave 10 in October 2024, SHARE conducted two test rounds (pretest and field rehearsal). To facilitate process evaluation for the future ideas, we experimented with an internal pretest using new formats of the TTT, as described in the paragraphs, for wave 10.

The TTT sessions for the pretest took place in September 2023 online exclusively with country teams, while the training for the field rehearsal involves survey agencies and will occur in Berlin in February 2024. Fieldwork for the pretest was conducted in September and October 2023, while fieldwork for the field rehearsal will take place in March and April 2024.

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. Another successful format was the TTT group exercises to train the contact procedures. The results were then presented at the plenary session.

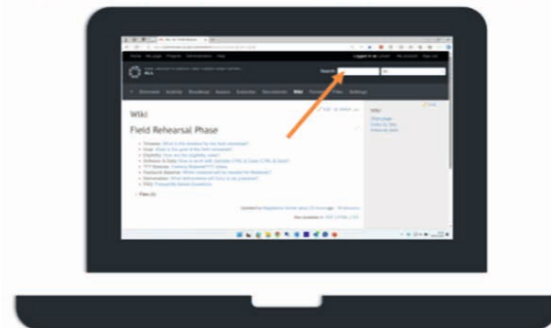
In addition to the TTT sessions, the software development team Centerdata organized one-on-one remote online sessions to help each survey agency separately to correctly install the Sample Control on their servers.

Wiki

Field Rehearsal Phase

- Timeline: [What is the timeline for the field rehearsal?](#)
- Goal: [What is the goal of the field rehearsal?](#)
- Eligibility: [How are the eligibility rules?](#)
- Software & Data: [How to work with Sample CTRL & Case CTRL & Data?](#)
- TTT Material and NTS: [Training Material/TTT slides](#)
- Fieldwork Material: [Which material will be needed for fieldwork?](#)
- Deliverables: [What deliverables will have to be prepared?](#)
- FAQ: [Frequently Asked Questions](#)

You can use the Redmine Search functionality if you are looking for something specific:



Example of offline documentation in form of a Wiki for field rehearsal training

THE LIFE SITUATION OF THE SENIOR POPULATION DURING THE PANDEMIC

Results from the SHARE-COVID19 project

In October 2023, the First Results Book (FRB) entitled “Social, health, and economic impacts of the COVID-19 pandemic and the epidemiological control measures. First results from SHARE Corona Waves 1 and 2” was published by DeGruyter. In 32 chapters, the book outlines key results of the SHARE-COVID19 project (grant number 101015924) that was launched under the European Commission’s Horizon 2020 programme in November 2020. The project has yielded a considerable amount of research findings and publications on the consequences of the pandemic and the measures implemented to prevent the spread of SARS-CoV-2 infections on the health, economic, and social well-being of the older population. The following paragraphs will highlight some of the results. Readers interested in a deeper immersion into the topic can download the FRB free of charge here.

Recommended reading:

Šime Smolić, Ivan Čipin and Petra Međimurec (2023). Persistence of limited access to health care for older Europeans in the course of the COVID-19 pandemic. In: Börsch-Supan et al. (eds.). Social, Health, and Economic Impacts of the COVID-19 Pandemic and the Epidemiological Control Measures. First Results from SHARE Corona Waves 1 and 2 (pp. 23-30). Berlin: De Gruyter.

The study of Smolić and colleagues found that over 7% of SHARE respondents experienced lasting barriers to **health care access** throughout the pandemic with notable differences by country. The odds of having medical treatments postponed or denied repeatedly were lower for older adults and occupationally active individuals. In addition, the findings showed recurring limits to health care for respondents who had poor overall health, who were vaccinated against COVID-19, or who had COVID-19-related health symptoms. As a policy recommendation, the authors conclude that access to health care services should be improved especially for the vulnerable parts of the population, including women, people in poorer health and economically deprived individuals.

Comparing the second to the first round of the SHARE Corona Survey, Gruber and Atzendorf found that the share of retired respondents aged 60+ who reported feelings of sadness/depression increased significantly between summer 2020 and summer 2021. Multi-level regression models reveal that women, the oldest-old, people with financial distress, people with worsened health status, and people living alone were at highest risk of reporting feelings of loneliness and depression. On the macro level, neither the number of COVID-19-related deaths per 1000 inhabitants nor the number of days with

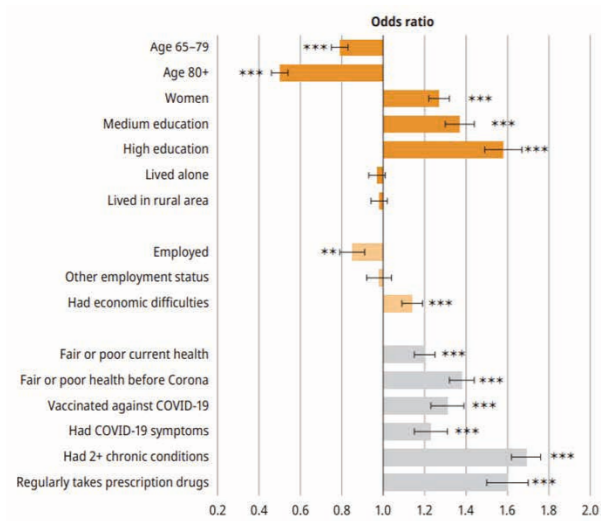


Figure 1: Results of logistic regression model for lasting barriers to health care access (Source: Börsch-Supan et al. (2023))

stringent epidemic control measures turned out to play a significant role. This is in line with Delerue Matos et al. who showed that epidemic control measures implemented by governments during the pandemic did not affect the mental health of the older population. To attenuate the negative effects of the pandemic on the well-being of older adults, improving the supply of and access to age-attuned mental health care will be crucial.

Börsch-Supan et al. analysed **short-time employment aids** (STEA). Their findings reveal that the use of STEA became more intense during the COVID-19 pandemic: the share of respondents who benefited from it increased from 17% in 2020 to 25% in 2021 in most SHARE countries. The exceptions were Italy, France, the Czech Republic, and Slovenia. Evidence suggests that vulnerable individuals (i.e., those who were less educated, previously unemployed, or in the lowest income tercile) still experienced a decrease in their working hours in the second phase of the pandemic, despite the relaxation of containment measures. For the longer run the authors conclude that STEA may have extended the life of unproductive companies, and thereby created unemployment in the longer run.

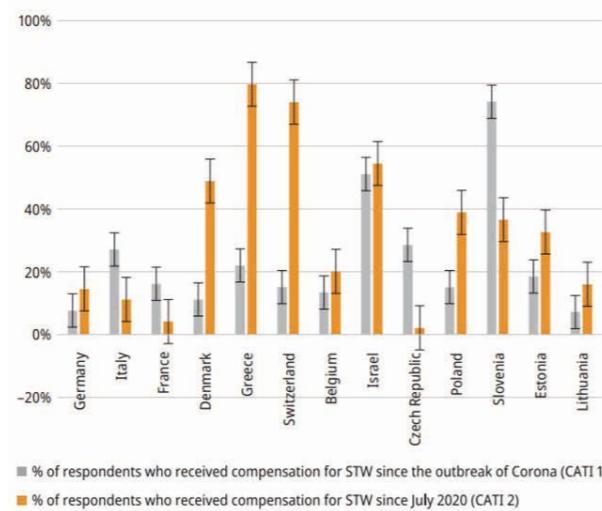


Figure 2: Prevalence of short-time employment aid in CATI1 and CATI2 (Source: Börsch-Supan et al. (2023))

Theodoropoulos and Voucharas investigate the short- and medium-term effects on the job loss

Recommended readings:

Alice Delerue Matos, Gina Voss and Paulo Silva (2023). Economic and health system policies during the pandemic and the mental health of older adults. In: Börsch-Supan et al. (eds.). Social, Health, and Economic Impacts of the COVID-19 Pandemic and the Epidemiological Control Measures. First Results from SHARE Corona Waves 1 and 2 (pp. 53-60). Berlin: De Gruyter.

Gruber Stefan and Josefine Atzendorf (2023). Developments in feelings of loneliness and depression among older adults in Europe and Israel during the pandemic. In: Börsch-Supan et al. (eds.). Social, Health, and Economic Impacts of the COVID-19 Pandemic and the Epidemiological Control Measures. First Results from SHARE Corona Waves 1 and 2 (pp. 77-84). Berlin: De Gruyter.

Recommended readings:

Axel Börsch-Supan, Vesile Kutlu-Koç and Diana López-Falcón (2023). Persistence of limited access to health care for older Europeans in the course of the COVID-19 pandemic. In: Börsch-Supan et al. (eds.). Social, Health, and Economic Impacts of the COVID-19 Pandemic and the Epidemiological Control Measures. First Results from SHARE Corona Waves 1 and 2 (pp. 141-148). Berlin: De Gruyter.

rate of COVID-19 containment measures imposed by governments during the pandemic. They found that the impact of containment measures on the job loss rate was significant at the beginning of the pandemic, but later disappeared. Furthermore, they found significant cross-country heterogeneity in the job loss rate and in the severity of the containment measures that were imposed. Again, vulnerable people, such as those who were lower educated, were older, or had health problems, were more likely to have lost their job during the pandemic.

Recommended readings:

Nikolaos Theodoropoulos and Georgios Voucharas (2023). Containment measures and job loss: Evidence from SHARE CORONA Surveys. In: Börsch-Supan et al. (eds.). Social, Health, and Economic Impacts of the COVID-19 Pandemic and the Epidemiological Control Measures. First Results from SHARE Corona Waves 1 and 2 (pp. 185-191). Berlin: De Gruyter.

Schumacher and Bethmann had a closer look at the impact of the pandemic and the containment measures on Europeans’ financial well-being. Their analyses reveal that there were clear differences in income losses across European regions, with losses being lower among households in Northern Europe and higher among households in Southern Europe. In addition, the results show that income losses reflected existing patterns of educational inequality and that the poorest households were less likely to report a recovery of their subjective financial situation over the course of the pandemic.

Fawaz et al. analysed housing, living arrangements, and contagion among Europeans aged 50+ during

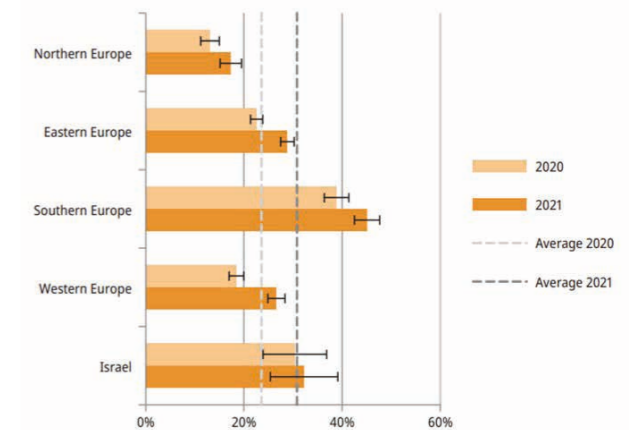


Figure 3: Share of individuals in households with income losses across European regions (Source: Börsch-Supan et al. (2023))

the pandemic. In 2020–2021, nursing home residents in the western part of Europe were more likely to develop COVID-19 symptoms or to test positive for the virus than older people living in private homes with a similar observed health status before the pandemic. Living in a larger household, in an apartment rather than a house, being active in the labour market, or having an active spouse, especially if the partner did not work remotely, increased the likelihood of contracting COVID-19. Furthermore, adult children were a source of contagion for older parents, regardless of whether they shared their home.

Recommended readings:

Alexander Schumacher and Arne Bethmann (2023). Financial hardship during the COVID-19 pandemic. In: Börsch-Supan et al. (eds.). Social, Health, and Economic Impacts of the COVID-19 Pandemic and the Epidemiological Control Measures. First Results from SHARE Corona Waves 1 and 2 (pp. 231-241). Berlin: De Gruyter.

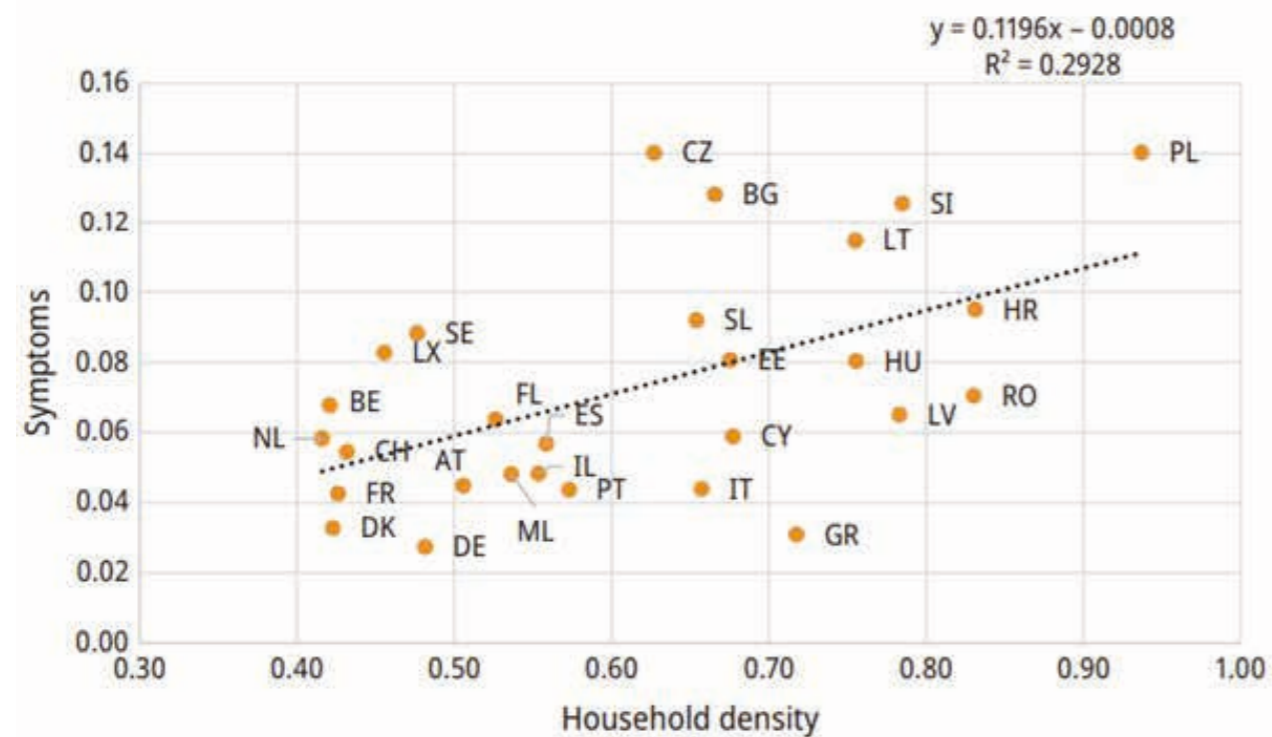


Figure 4: Correlation between having symptoms and household density (Source: Börsch-Supan et al. (2023))

Recommended readings:

Yarine Fawaz, Anne Laferrère, Pedro Mira and Elizaveta Pronkina (2023). Housing, living arrangements, and contagion among Europeans aged 50+. In: Börsch-Supan et al. (eds.). *Social, Health, and Economic Impacts of the COVID-19 Pandemic and the Epidemiological Control Measures. First Results from SHARE Corona Waves 1 and 2* (pp. 231-241). Berlin: De Gruyter.

RECORD LINKAGE IN SHARE

Linking survey data to administrative data in different countries

SHARE encourages record linkage projects in its member countries in order to enhance survey data with objective administrative data. Combining survey data as a more subjective perspective on respondents' lives and administrative data optimally exploits the advantages of both data sources. Currently there are ongoing linkage projects in eight SHARE countries: Austria, Belgium, Denmark, Germany, Estonia, Finland, Italy and the Netherlands.

During the reporting period, preparations were made for the collection of linkage consents in Wave 10. This includes the preparation of new linkage projects in Austria and Germany. Starting with wave 10, Austrian SHARE data will be linked to the newly established Austrian Micro Data Center (AMDC). In Germany, in addition to the existing linkage with the German Pension Insurance (DRV), a second linkage with the Institute of Employment Research (IAB) will be implemented from wave 10 onwards. Preparations include the adaptation of the CAPI instrument and the informed consent materials for respondents.

Linked data sets broaden the research possibilities, as the following example shows: Using the REG-LINK-SHAREDK data set, Mose et al. (2023) validated self-reported health and medicine use among Danish SHARE respondents with administrative data from Statistics Denmark and explored the influence of age, gender, and educational levels. They found that there is a good agreement for the reporting of diseases such as diabetes, stroke, Parkinson's disease, and heart attack. There is a fair agreement for diseases such as GI ulcer disease and high blood cholesterol. For medicine use, there is a very good agreement for medications used

to treat diabetes and a fair agreement for medications used to treat chronic bronchitis, joint pain, and other pain. The study showed that there are only small gender differences in the agreement. Women were more likely to report correctly for stroke and diabetes. Self-reports from respondents aged 70 years and older showed a lower agreement compared with younger respondents. The authors also found an association between higher education and better self-report for most conditions and medicine use.

The authors concluded that SHARE data on self-reported medical conditions and medicine use are reliable for epidemiological research, with some limitations regarding age and education. Gender differences were minimal, except for self-reported medicine use. Self-reported conditions related to hospitalization and daily life are more reliable. Overall, self-reported medicine use is a valuable epidemiological tool. SHARE strives to advance harmonization of linkage projects in general and more specifically of the internal and external processes. The overall aim is the continuation of the currently ongoing linkage projects as well as initiation of new projects in more countries, in order to foster cross-country comparisons using survey, as well as administrative data.

Literature:

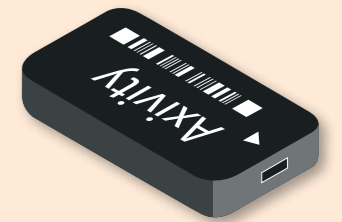
Mose, J., Jensen, K. H., Scheel-Hincke, L. L., & Andersen-Ranberg, K. (2023). Are self-reported medical conditions and medicine use from middle-aged and older adults credible? A validation study comparing Danish SHARE-data with National Health Register data. *Annals of Epidemiology*, 87, 100-106.

HEALTH MEASURES IN SHARE

How health measures add to our understanding of conditions over the life course that affect health in later life

Although SHARE data largely consists of self-assessed information derived from respondents' answers, health measures that are based on assessments using objective measurements or precisely defined test batteries play an important role in SHARE. Prominent examples are indicators such as grip strength and walking speed. Such measures facilitate comparisons across countries and allow adjustments of self-assessed measures of health. In recent years, revisions of the health care module in SHARE have responded to the need to improve the measurement of access to care, by better identifying unmet needs and barriers to access to care, and by refining our understanding of healthcare utilisation in its various dimensions. More objective health measures minimize artefacts in cross-national analyses generated by "differential item functioning", e.g., because self-assessed health

measures may be interpreted differently by respondents in different countries. More objective health measures are therefore helping to provide a precise understanding of healthcare demand and utilisation across the diversity of national healthcare and health insurance systems. This report provides an update on SHARE's dedication to offer deeper understanding of health and aging using novel measurement strategies for population-based studies: 1) the validation of accelerometer measurements for activity recognition 2) the release of measures derived from the analysis of dried blood spots in twelve countries during Wave 6 (the SHARE Biomarker Project), and 3) the release of a preliminary measure of cognition derived from the large test batteries in five countries after Wave 9 (the SHARE Harmonized Cognitive Assessment Protocol, SHARE-HCAP).



Accelerometer Study

Advancements in SHARE's objective health behaviour data

In order to measure the physical activity of SHARE respondents, a study using accelerometers was conducted in the eighth survey wave. A subsample of respondents was asked to wear an accelerometer on their thigh for seven consecutive days. The data derived from the acceleration measurements has been available to researchers since 2021. The information on measured physical activity was expanded in February 2022. However, this data is more of a "technical nature" and is primarily suitable for researchers who already have knowledge in the field of sensor-based activity measurement.

Further developments in the possibilities for analysing accelerometer data are progressing rapidly, which should also benefit SHARE users. The aim is to analyse the sensor data collected in SHARE with a specialised software in order to identify body postures and activities, such as walking, standing, sitting, lying down, cycling, climbing stairs, etc. This information

is to be made available to data users in the form of easy-to-understand variables that, for example, provide information on the number of steps per day or the daily duration of vigorous physical activity. A special data collection was conducted in 2023 to validate the SHARE data, aiming to ensure that the detection of postures and activities with the SHARE sensor data lead to valid results. The initial results of the validation study are positive, resulting in the use of the posture detection software in the release 9.0.0 in Spring 2024.

Collaboration in the Prospective Physical Activity, Sitting and Sleep Consortium (ProPASS) was continued with the aim of harmonising the data from various accelerometer studies. The cooperation with ProPASS should enable researchers in future to combine the SHARE accelerometer data with data from other studies from all over the world and thus make their analyses even more meaningful.

SHARE-HCAP: The Health Study

The SHARE-HCAP data collection ended in November 2022. The resulting SHARE-HCAP data comprises data from more than 2,600 respondents in the Czech Republic, Denmark, France, Germany and Italy. Since then, a team of researchers has been working on data cleaning and integration of this study with the longitudinal SHARE datasets. Some tests from SHARE-HCAP's cognitive test battery were scored centrally by a team of researchers and that data has now been integrated with the raw data from the SHARE-HCAP respondent interview.

Additional centralized scoring is necessary since our preliminary analyses show significant differences across interviewers and countries. Hence, while data preparations are already under way to create a user-friendly and easy-to-use SHARE-HCAP database, there still need some work to be done on the raw data.

Since the publication of Manly et al. (2022) article and other documentation on the development of the HRS-HCAP classification algorithm have been

made publicly available, the SHARE-HCAP team has worked on the development of a classification algorithm that follows closely the approach by HRS. As other HCAP sister studies are working their replication of the HRS-HCAP classification algorithm, the SHARE team has been closely following these developments within the HCAP network.

As part of the classification algorithm, confirmatory factor analysis models were used to examine the factor structure of SHARE-HCAP's cognitive test battery. Based on theory and prior empirical work, unidimensional models representing the cognitive domains of memory, executive functioning, visuospatial skills, language and fluency, and orientation were tested on the full sample. We derived factor score estimates based on these measurement models. Unfortunately, these models show a significant deviation from the underlying assumption of measurement invariance across the five countries. Nevertheless,

we used the deterministic algorithm of Manly et al. to provide a preliminary classification of respondents into three classes of cognition: normal, mild cognitive impairment and severe cognitive impairment. The resulting data set is available via the SHARE Research Data Center website and a documentation with the appropriate caveats on the project website www.mea-share.eu/hcap.

SHARE-HCAP has continued to stay well-connected with other HCAP studies in the world. A lot of knowledge sharing has taken place to help us implement HCAP as harmonized as possible with the other HCAP studies and to keep track of the latest (data) insights from other studies. And as part of our continued effort to share knowledge, the research team has given a 'Fieldwork challenges' talk at one of the HCAP network meetings to provide interested researchers from the HCAP network insights into multi-country fieldwork challenges for HCAP.

Reference:

Manly, J. J., Jones, R. N., Langa, K. M., Ryan, L. H., Levine, D. A., McCammon, R., Heeringa, S. G., & Weir, D. (2022). Estimating the Prevalence of Dementia and Mild Cognitive Impairment in the US: The 2016 Health and Retirement Study Harmonized Cognitive Assessment Protocol Project. *JAMA neurology*, 79(12), 1242–1249. <https://doi.org/10.1001/jamaneurol.2022.3543>

Research output:

Boersch-Supan, A., Douhou, S., Fernández, I., Otero, M. Release note to the preliminary SHARE-HCAP classification of Mild and Severe Cognitive Impairment in five European Countries, MEA Discussion Paper, 2023.

Douhou, S., Otero, M., Pettinicchi, Y., Bergmann, M., de Luca, G., Quezada, M., Rieckmann, A., & Börsch-Supan, A. Cognition and Ageing: Introducing SHARE-HCAP. MEA Discussion Paper, 2023. Forthcoming in M. Bergmann, M. Wagner, & A. Börsch-Supan (Eds.), *SHARE Wave 9 Methodology: From the SHARE Corona Survey 2 to the SHARE Main Wave 9 Interview*. Munich: SHARE-ERIC.

Otero, M., Fernández, I., Douhou, S., Börsch-Supan, A.: Factor structure of the Survey of Health Aging and Retirement in Europe, Harmonized Cognitive Assessment Protocol. MEA Discussion Paper, 2023.

The SHARE Biomarker Project

In 2023, we finalized the release of the assay results from seven routine biomarkers with an extensive documentation. After having finished the validation and correction process for our biomarkers values gained from dried blood spots (DBS) collected in Wave 6 in 2015, we checked them thoroughly and compared them to values gained in the sister studies HRS and ELSA. Population means turned out to be reasonably close, given differences in the populations, collection years and/or specimen type (e.g., ELSA collected venous blood whereas SHARE dried capillary blood). We also took individual biomarkers through further and necessary validity tests by making cross-country comparisons among the SHARE DBS countries e.g., for country prevalence or physiological meaningfulness. We have given special attention to the kidney biomarker Cystatin C, the blood-lipid biomarkers (total cholesterol, high density lipoprotein cholesterol, and triglycerides) and the diabetes marker HbA1c.

We resolved the much-debated "HbA1c puzzle" for this important diabetes marker. Similar to findings in the US, we found "false spikes" in the chemical analyses which made it impossible to harmonize the different values gained from the instruments used for the two batches of the analyses in 2018 and 2020 as described in the last Annual Activity Report. We used a new analysing instrument in the

laboratory at the University of Washington, Seattle, USA and re-assayed a major subsample (1000 samples) from both batches, each subsample covering samples from all countries and the entire range of physiologically possible HbA1c biomarker values. The resulting values were free of the false spikes and could therefore be used to create a new conversion equation to translate the raw HbA1c assay results into venous-blood equivalents for subsequent research. The results compare well with physiological and other epidemiological data.

The release document details the collection and analysis of the seven biomarkers. It is published on the project website www.mea-share.eu/dbs. A short version of the extensive release documentation was prepared and submitted to the *International Journal of Epidemiology, Cohort Profile Update*¹.

The validity checks for less conventional biomarkers such as cytokines and neurodegenerative markers are still underway. We have worked on methodological papers: We finished a paper describing the validation of ApoE4 protein data (as analysed from SHARE DBS) with DNA from samples of deceased SHARE respondents². A second publication showing a correlation between the possession of the ApoE4 allele and cognitive decline was submitted to the *Journal Alzheimer's & Dementia*³.

- 1 Börsch-Supan, M., Andersen-Ranberg, K., Cofferen, J., Groh, R., Horton, H.M., Kerschner, E., Kha, T.M., Potter, A.J., Schmidutz, D., Sun, A., Weiss, M., Wener, M.H., Börsch-Supan, A. Cohort Profile Update: Biomarkers from dried blood spots in SHARE. MEA Discussion Paper, 2023. Submitted to *Int J Epi*.
- 2 Borbye-Lorenzen, N., Deza-Lougovski, Y.I., Holmgaard, S., Weiss, L.M., Bækvad-Hansen, M., Skogstrand, K., Rieckmann, A., Börsch-Supan, A., Börsch-Supan, M. Assessment of circulating apoE4 levels from dried blood spot samples in a large survey setting. MEA Discussion Paper, 2023. Accepted in *Alzheimers Dementia*.
- 3 Deza-Lougovski, Y.I., Weiss, L.M., Horton, H.M., Sun, A., Borbye-Lorenzen, N., Skogstrand, K., Holmgaard, S., Andersen-Ranberg, K., Lundmark, V.P., Börsch-Supan, A., Börsch-Supan, M., Rieckmann, A. Circulating ApoE4 Protein Levels from Dried Blood Spots predict Likelihood of Cognitive Impairment. MEA Discussion Paper, 2023. Conditionally accepted in *Alzheimers Dementia*.

SHARE  **HCAP**
Think-Recognise-Remember: the Health Study

SPLASH

The Social Policy Archive for SHARE

The “Social Policy Archive for SHARE” (SPLASH) aims to overcome existing data limitations to foster comparative policy-oriented research using SHARE microdata. In effect, SPLASH functions as an extension, conducting the required searches, evaluation and organization for compiling suitable data for SHARE’s various research projects. The process involves a comprehensive review of online resources from institutions, organizations and independent researchers. Data is vetted based upon SHARE’s criteria for age group, location, years of coverage and other qualitative factors concerning the data quality and contextual relevance. Once approved, data sources are documented and coded according to the website’s system requirements. The continuous survey has produced a collection of resources mapped at the local, national and cross-national level thereby performing the work of identifying policy and population indicators which support the robust analysis of SHARE data.

In the ongoing pursuit of comprehensively addressing transnational nuances related to the COVID-19 pandemic within SPLASH, there has been a concerted effort to seamlessly revise and expand its data collection during 2023.

Firstly, the compilation of COVID-19-related Short-Time Employment Aid (STEA) policies and instruments that were implemented in all SHARE countries went into major revisions and quality checks. The STEA programs seek to preserve jobs at companies experiencing a temporary decline in business activity due to the pandemic and supporting the workers’ incomes whose hours were cut back. The instruments include

short-time employment, wage subsidy programs and combined measures at national level.

The STEA policy database, initiated in 2020 and carried out centrally by the SPLASH team, comprehensively addressed all significant policy changes and their associated updates until December 2022. This monitoring was deemed crucial, especially considering the temporary nature of many job retention schemes implemented during this period. The thoroughness of the data collection process required the meticulous revision of legal documents and reports, ensuring a comprehensive understanding of the intricacies of the instruments in question. The data were systematically coded using SPLASH’s standardized template for consistency and accuracy purposes.

The compiled data underwent a rigorous evaluation and quality checks conducted by the SHARE National Country Teams during the last quarter of 2023. This collaborative effort resulted in the revision of more than 400 measures, a testament to the commitment to data accuracy and reliability. The revised measures will be released on the SPLASH website in 2024, further enriching its repository of social policies with valuable insights into the dynamic landscape of COVID-19-related instruments and their related impacts.

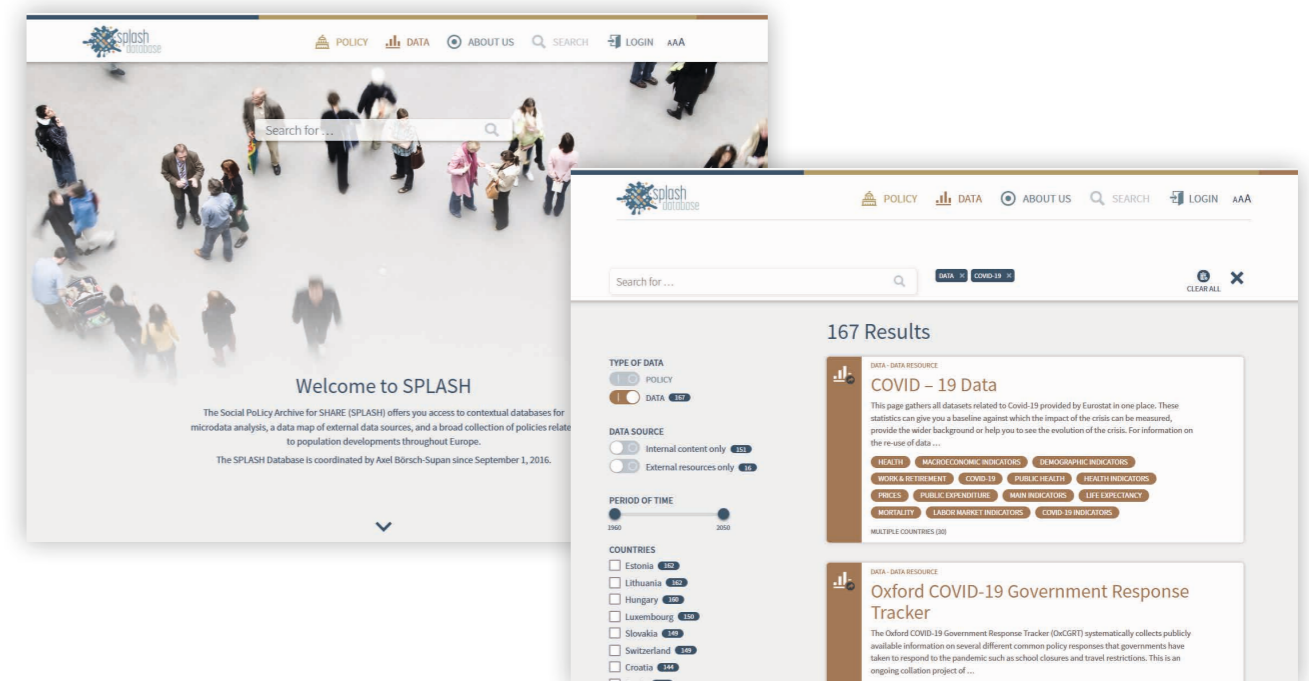
In tandem with these activities, the quantitative database update was significantly influenced by methodological changes implemented by data providers, coinciding with what some consider the end of the COVID-19 pandemic. These changes included, for instance, the discontinuation or re-estimation of series of indicators addressing the incidence and prev-

alence of COVID-19 in most countries. Additionally, there was a comprehensive reevaluation of research resources at the subnational level, exploring areas less covered such as environmental and local infrastructure measures. As a result, more than 400 variables with sub-national disaggregation and more than 100 new resources for the data map were compiled.

Furthermore, the update and expansion of the data map of external data sources included additional COVID-19-related policy databases and research resources, as well as macro indicators for the analysis of the regular SHARE waves. As with previous exercises, the collection of long-series comparative indicators was prioritized to facilitate longitudinal analysis whenever

possible. All contents are revised and updated regularly, and new indicators of interest are added in response to social and economic developments.

In addition to these efforts, it is noteworthy that the SPLASH online platform has navigated a major system update. This was carefully planned to support and handle the most recent data collection and shows the commitment to making sure the platform has a robust capacity to host and disseminate the extensive datasets for comparative policy-oriented research using SHARE data. The improved website is set to be released in 2024, aiming to provide users with a better and more user-friendly experience.



SHARE USERS

Number of users per country



COMMUNITY OF SHARE USERS IS GROWING

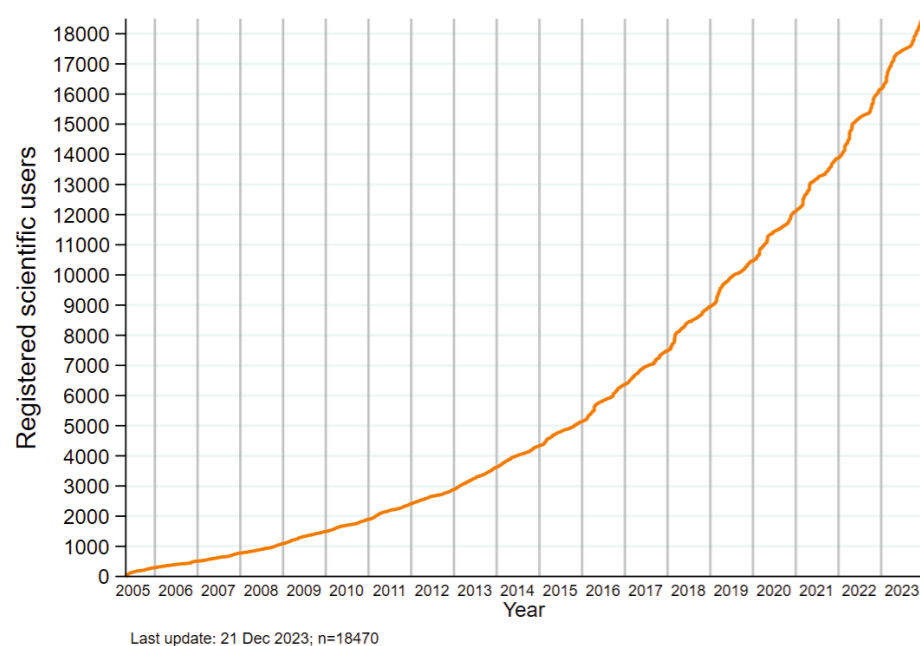
More than 2,300 new users in 2023

By the end of December 2023, SHARE counted a total of 18,470 user registrations. Once again, not only the total number of registered users increased, but the annual growth recorded a record high as well: 2,307 new users signed up in 2023.

These numbers emphasise the importance of SHARE and its data for studying the effects of health, social, economic, and environmental policies over the life-course of individuals. The data allow focusing on European and global citizens when combined with harmonised datasets from SHARE’s international sister studies, such as ELSA in England or HRS in the USA.

SHARE’s holistic approach is also reflected by the background of its users, who display diverse origins from all over the world.

In 2023, SHARE users came from a record 89 countries, bringing perspectives from different scientific disciplines, societies, and cultures. The country with the highest number of registered users remains Germany with 3,590, followed by the Netherlands with around 1,900 registrations and the United Kingdom with more than 1,600. With over 1,000 registered users, the USA rank sixth while being the country with the highest number of SHARE users outside of Europe.



SHARE Data Users

NATIONAL SCIENTIFIC DISSEMINATION

Country-level efforts to increase SHARE’s scientific impact

Throughout 2023, the SHARE country teams organized various events and workshops to expand SHARE’s user community and enhance its scientific impact. The Slovenian country team gave a workshop on modelling the impact of public policy measures using SHARE data, presented SHARE at the Statistical Advisory Committee of Older Persons, and introduced researchers from two different faculties to SHARE datasets. France saw a research workshop on inequalities in applied economics and the French Health Economists’ Conference with about 120 participants, where discussions included analyses based on SHARE data.

In **Croatia** at the University of Zagreb, three distinct SHARE workshops for labour market institution employees covered the key aspects of the SHARE database, provided the basic statistical tools for survey data analysis and showcased practical examples for using SHARE data. The SHARE Croatia conference concluded the project funding waves 8 and 9. The event with 80 participants featured the presentation of a monograph about the project, talks from researchers and a panel. **Israel** hosted several smaller workshop sessions introducing SHARE and its data to interested Israeli scientists. The **Austrian** country team organized a joint workshop and user meeting with ESS Austria, covering diverse topics using SHARE and/or ESS data. SHARE **Bulgaria** presented the SHARE survey and its infrastructure at the University of National and World Economy in Sofia. SHARE **Switzerland’s** activities in-

cluded a workshop on advance care planning with 40 participants and a presentation at the CUSO doctoral school focusing on the utilization of SHARE data. In **Slovakia**, a research seminar discussed the SHARE project and data, as well as the consequences of an ageing population.

In **Lithuania**, a training event on SHARE data analysis attracted 40 participants, while a presentation at the “ESS picknick” introduced SHARE and its possibilities for analyses to 50 interested researchers. The “Silver Society Forum” at Vilnius University featured two talks based on SHARE data in front of an audience of 88. In **Greece**, two workshops aimed to familiarize master students at the University of Piraeus with SHARE data and longitudinal survey analysis. As a result, many master students decided to use SHARE data for their master’s project.

The SHARE **Latvia** team organized a data user workshop, an online discussion by the Association of Latvian Statistician and a breakfast for scientists featuring SHARE research. **Italy** witnessed numerous events, including the Summer Institute on Ageing at the Venice International University, the “Active ageing regional workshop” at the University of Venice, and seminars, workshops, and conferences organized by the host universities of SHARE, addressing topics such as lifecycle and labor market issues, active aging, and the implications of aging on health and social security, with a total number of 340 participants.

Overall, these events reflect a broad effort across Europe to leverage SHARE data for understanding aging-related phenomena, shaping public policies, and advancing SHARE research in health economics and social sciences.



USER SUPPORT ACTIVITIES

Facilitating the use of SHARE data

In 2023, the SHARE Central team at SBI continued the work on different user support activities that address both new users as well as established SHARE users. We started to update the comprehensible meta data and documentation files like Release Guides, the SHARE Data & Documentation Tool, and the cross-wave-comparison files for the upcoming Release 9.0.0 that includes Wave 9 data for the first time.

In addition, the Data Base Management Team at SBI takes care about the maintenance of an email account for user requests: info@share-project.org. Users have the opportunity to send all kinds of SHARE-related questions to this account. Responding to the researchers' questions within a short period, the SHARE Central team 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 the country teams, area coordinators or the experts for weights and imputations. In 2023, the SHARE user support team could answer more than 450 user requests.

A third important part of the SHARE user support is the engagement in direct contact with researchers at user workshops in order to introduce users to the SHARE data and to train both experienced and unexperienced users. In 2023, the SHARE User Workshop took place in Berlin, Germany. In addition, a joint ESS-SHARE workshop and user meeting took place in Vienna, Austria. Another workshop on utilizing SHARE Data in academic research and policymaking was organized in Helsinki, Finland. Additionally, the Italian country team invited for the 2023 edition of the Summer Institute on Ageing in Venice, Italy.

SHARE USERS

ALL OVER THE WORLD



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A–C

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H–M

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PO LICY IMP ACT

With its broad data on the economic, social and health situation of European citizens, SHARE enables policymakers to tackle socio-economic and public health challenges with the help of scientific evidence and contributes to improving the living situation of European citizens.

POLICY IMPACT

Evidence-based policymaking with SHARE

“The Ministry of Solidarity-Based Future is aware of the importance of good and high-quality data (...), as this is the only way to properly plan the future development of an area, specifically the area of long-term care (...). One such data source is SHARE, which played an important role in the adoption of the new Long-Term Care Act and in the planning of activities arising from it.” says Luka Omladič, State Secretary, Ministry of Solidarity-Based Future, Slovenia

Healthcare, pension systems, labor markets, social cohesion – with an increasingly elderly population and declining birth rates, Europe faces significant challenges in all aspects of society. Understanding and addressing population ageing is therefore crucial to mitigate and steer its consequences.

With its broad data on the economic, social and health situation of European citizens, SHARE enables policymakers to tackle socio-economic and public health challenges with the help of scientific evidence. By providing this data, SHARE has been contributing to improving the living situation of European citizens since its initial setup.

Unique in its design, the SHARE survey offers harmonized, comparable data of 27 European countries and Israel to investigate the consequences of population ageing. Please find here selected examples of how SHARE data has contributed to evidence-based policymaking at the national, European and global level.

ON THE NATIONAL LEVEL

SLOVENIA

Adoption of a new Long-Term Care Act



In 2023, Slovenia adopted a new Long-Term Care Act, which introduces a new financing system for long-term care through compulsory long-term care insurance, to be introduced in July 2025. Long-term care will be provided in the form of all-day care in an institution, daily care by a care provider, home care or a family caregiver, or a cash benefit in the form of a subsidy. Throughout the preparation of the Long-Term Care Act, the Slovenian Ministry of Health and the newly established Ministry of Solidarity-Based Future, which took over responsibility for long-term care, used research based on SHARE data and consulted the Slovenian SHARE Country Team. SHARE data, including the national SHARE drop-off data, were used to estimate the number of informal care recipients, the number of people with unmet needs and the number of people who will be eligible to enter the new long-term care system. This in turn made it possible to estimate the amount of public funding needed to cover the costs of the new long-term care system.

Evaluation of Active Ageing Strategy & Development Report

In Slovenia, SHARE data have been used by the Institute for Macroeconomic Analysis and Development of the Republic of Slovenia (IMAD), the institution assisting the government in setting medium- and long-term goals for the country's economic and social development. In 2023, IMAD published an analysis that assessed the current situation of the Active Ageing Strategy adopted by the Government of the Republic of Slovenia in 2017.

In it, SHARE data is used on multiple occasions, such as to estimate the number of people who suffer from poor health, sadness or depression, the number of informal care providers, of people with unmet needs, and to assess social inclusion and the housing situation. SHARE data has also been regularly referenced in the annual Development Report, a document that monitors the implementation of Slovenia's Development Strategy.

Israel

Informing public policy with tailor-made data



Israeli Country Team Leader Professor Shiovitz-Ezra presented SHARE for evidence-based policymaking to the Steering Committee of Israel. The committee is formed by representatives from the Ministry for Social Equality, Ministry of Health, Ministry of Science and Technology, Ministry of Labor, Social Affairs and Social Services, The Prime Minister's Office, National Insurance Institute and the Israel Central Bureau of Statistics (ICBS). The presentation included research insights on topics such as loneliness before, during and after the COVID-19 pandemic, as well as a discussion of the new self-administered (“drop-off”) questionnaire planned for wave 10. This questionnaire will allow to investigate Israel-specific topics, such as the Hamas attack of October 2023 and its consequences.

Furthermore, the ICBS invited the Israeli SHARE team to present the survey for a comprehensive report about “Indicators for Optimal Ageing in Israel”. This biennial report provides Israel's ministries and agencies with a shared set of indices for determining and measuring levels of optimal ageing among Israeli citizens. The dashboard will help guide policy making, budget allocation and program development. SHARE data is used to monitor

these indices across time. Guided by this report, large-scale initiatives are developed, focusing on minimizing health, social and financial risk among older adults. Overall, they aim to increase older adults' independence.

Austria



Austrian Health Report

The Austrian Health Report 2022, which was published in 2023, was created by Gesundheit Österreich GmbH (GÖG) on behalf of the Federal Ministry of Social Affairs, Health, Care, and Consumer Protection (BMSGPK). It analyses and presents the health status and health behaviour of the Austrian population, as well as healthcare in Austria. Additionally, the report examines Austrians' living conditions and highlights their connection to health. The report provides a solid foundation for health policy decisions and interventions. Specifically, it relies on SHARE data to assess the work quality of older employees.

ON THE EUROPEAN LEVEL

EUROPEAN PARLIAMENT

Social and Economic Consequences of COVID-19

In their report "Social and Economic Consequences of COVID-19", the Policy Department for Economic, Scientific and Quality of Life Policies analyzes the consequences of measures aimed at countering the effects of COVID-19. Specifically, it examines the consequences of the measures on industry, small & medium enterprises, the cultural and creative industries as well as the consequences for workers and working practices. It relies on SHARE's Covid data to determine the percentage of active workers who retired after the outbreak of the pandemic or stopped working earlier than planned directly because of the pandemic.

EUROPEAN INSURANCE AND OCCUPATIONAL PENSIONS AUTHORITY (EIOPA)

Advice for gender pension gap and occupational pension sector

EIOPA, the European Insurance and Occupational Pensions Authority, is a financial regulatory institution of the European Union. It is advised by the Occupational Pensions Stakeholder Group, which provides recommendations and policy assessments. In their report "Advice for gender pension gap and occupational pension sector", the group examines the gender pension gap in the occupational pension sector, pinpoints effective strategies, and provides recommendations, heavily relying on SHARE data.

EUROPEAN COMMISSION

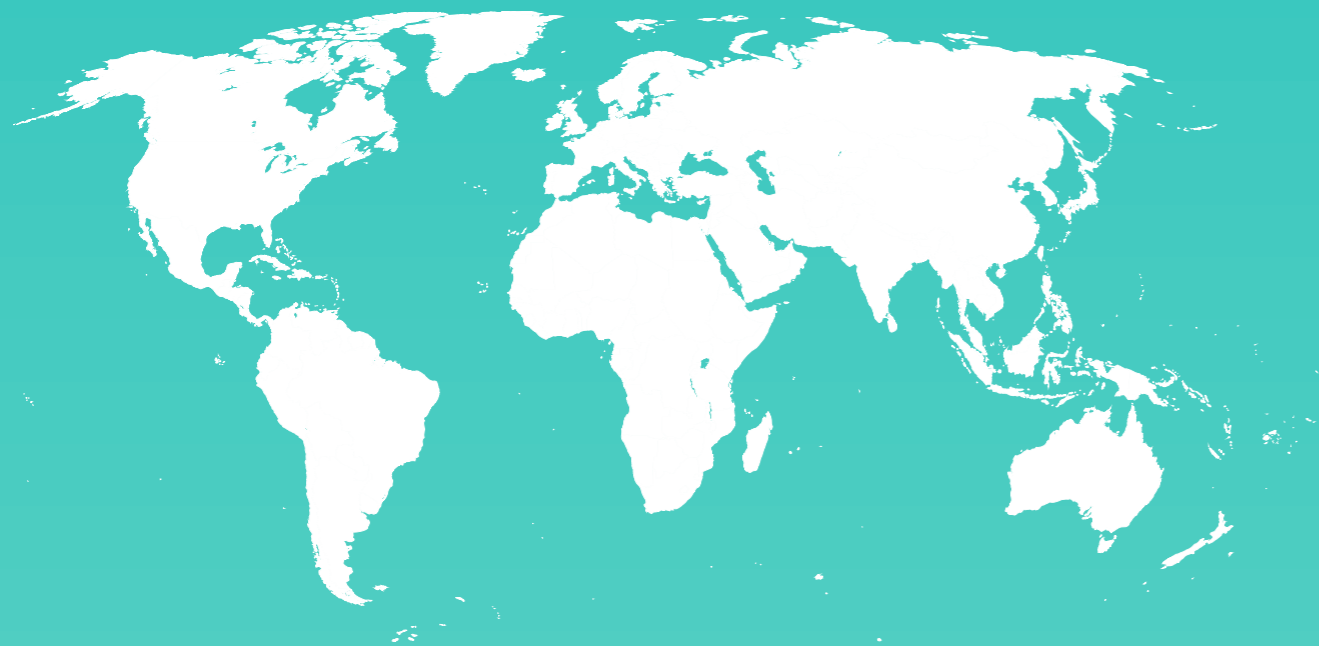
Projecting the risk of developing long-term care needs

The European Commission's Joint Research Centre, tasked with providing independent, evidence-based science and knowledge to the European Commission, published a "Demographic microsimulation of long-term care needs in the European Union". The study presents a prototype microsimulation demographic model that projects the risk of developing long-term care needs for the over-50 population in various European countries from 2011 to 2070. It uses SHARE data in combination with a dynamic demographic microsimulation model to project future demographic developments.

Health Systems Performance Assessment

The European Commission's expert group on Health Systems Performance Assessment (HSPA) published a report titled "Mapping metrics of health promotion and disease prevention for health system performance assessment". In it, the HSPA developed a new framework for assessing health system performance. Not only did it rely on SHARE data for measuring health outcomes, such as indicators describing the socioeconomic impacts of health and health systems (employment rates, sick days by certain diseases, early retirement, and unemployment rates), but SHARE representatives were also actively contributing as consultants during the development of the new framework. This renewed framework will facilitate international collaboration by providing a common language, definitions and shared understanding among policy makers, stakeholders, and organisations. It provides a founda-

tion for the development of future indicators, data collection, policy analysis and knowledge integration. This expert group also included Norway, the OECD, the WHO and the European Observatory on Health Systems and Policies as observers.



ON THE GLOBAL LEVEL

OECD

The COVID-19 Pandemic and the Future of Telemedicine

OECD Health Policy Studies analyze the organisation and performance of health systems, and factors explaining performance variations. In their report “The COVID-19 Pandemic and the Future of Telemedicine”, the OECD investigates the prevalence of the use of telemedicine in OECD countries, describing how governments scaled up remote care during the pandemic and exploring the impact that this massive shift has had on health care system performance. The study draws on SHARE research to outline how the pandemic affected individuals aged 50 and older with chronic conditions in forgoing or postponing medical care.

Time for Better Care at the End of Life

The COVID-19 pandemic has brought attention to the lack of proper support for people at the end of life, the fact that access to such care was not always possible and the importance of reducing suffering for those dying. In its report “Time for Better Care at the End of Life”, the OECD’s Directorate for Employment, Labour and Social Affairs analyzes the current status of end-of-life-care in the face of more chronic conditions and an ageing population, and provides policy recommendations to improve care for the dying. It relies on SHARE data to determine how many people who need palliative or end-of-life care actually receive it, as well as socio-economic inequalities among those who receive it.

OECD & European Commission

Measuring social protection for long-term care

In a joint effort to better understand and improve social protection for older people with long-term care needs, the OECD and European Commission came together on several occasions for a mutual learning workshop. The exchange resulted in a policy brief on adequate social protection in long-term care. In it, the experts of OECD and European Commission analyze the public benefits or services for people with long-term care needs. The report uses SHARE data to calculate long-term care needs, home care, out-of-pocket costs of care, and to define people at risk of poverty.



OPERATIONAL ASPECTS

SHARE is grateful for the financial support received. We thank the German Federal Ministry of Education and Research and the European Commission, 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 and the US National Institute on Aging for their support of innovation in SHARE and the additional support of data collection in those countries that are facing financial challenges.

SHARE-ERIC COUNCIL MEETING 2023

The 16th SHARE-ERIC Council Meeting took place on Monday 5th of June 2023 in Berlin.

In his presentation, the SHARE-ERIC Managing Director, Prof. Dr. h. c. Axel Börsch-Supan, reported on recent scientific achievements of SHARE and the wide array of topics covered in the survey. Among other things, he reported on the Harmonized-Cognitive-Assessment-Protocol Study (HCAP), the innovative collection of dried blood spots (DBS) and biomarkers, and the COVID19 research.

Prof. Börsch-Supan also pointed out the ever-rising number of registered SHARE users and publications. He finally reported that SHARE-ERIC, together with ESS-ERIC, had submitted a grant application “SurveyDigit” under the INFRADEV call that may secure funding for the implementation of the SHARE 2.0 multimode technology.

Prof. Dr. David Richter reported on the fully equipped offices in Berlin, the transition of the former MPI Munich employees to SBI, and the continuation of the SHARE team’s work. Data from wave 9 is ready for release, and preparations for wave 10 are underway. The team is also transitioning from Blaise to Quest with Centerdata and starting a small accelerometry validation study.

One election took place during the meeting. Long-term member of the SHARE-ERIC Management Board Pedro Mira, professor of economics at CEMFI, was re-elected as Coordinator SHARE-ERIC Management at the Management Board for another two years. The delegates thanked Pedro for his past contributions and his commitment to SHARE and congratulated him on his re-election.

Furthermore, the Council acknowledged the appointment of Management Board Member Agnieszka Chłoń-Domińczak of the Institute of Statistics and Demography at SGH Warsaw School of Economics as the new Deputy Managing Director of SHARE-ERIC and congratulated her to the new position.

As is customary, another focus of the Council meeting lay on the financial affairs of the SHARE-ERIC. The SHARE-ERIC Head of Finances, Kathrin Axt, presented the Financial Statement for 2022, which was acknowledged by the SHARE-ERIC council. She further presented the Spending Plan for 2023 to the approval of the SHARE-ERIC council. SHARE-ERIC Managing Director, Prof. Dr. h. c. Axel Börsch-Supan, explained an increase of the participation fee for 2024 which was approved by the SHARE-ERIC council. The SHARE-ERIC council also acknowledged the long-term fee plan for 2025-2026.



SHARE WAVE 10 PRETEST MEETING

(3-5 MAY 2023 IAȘI, ROMANIA)

In spring 2023, the SHARE Wave 10 Pretest Meeting in Iași, Romania, showcased a vibrant agenda with topics in survey operations and scientific research.

The event kicked off with a warm welcome from the Romanian Country Team, setting the stage for insightful discussions on current affairs and strategic initiatives. Throughout the morning, attendees received updates on operational details for Wave 10, gaining valuable insights from various EU projects and engaging in a roundtable on survey funding allocation. Following the lunch break, the afternoon sessions explored captivating scientific discussions using SHARE data. Topics ranged from cognitive

studies and biomarker validations to exploring the impact of missed healthcare during the Covid-19 pandemic. The latter part of the day focused on future planning, unveiling upcoming SHARE data collections and digital infrastructure enhancements. The meeting concluded the next day with sessions on selecting new survey content between waves, along with country-specific discussions and advancements in SHARE's technological capabilities.

Overall, the gathering emphasized collaboration and innovation within SHARE, underscoring the commitment to advancing aging research and survey methodology.

SHARE WAVE 10 POST-PRETEST MEETING

(25-27 OCTOBER 2023 BRATISLAVA, SLOVAKIA)

The fall SHARE Meeting convened country team members, international coordinators, and scientific monitoring board representatives to assess Wave 10 pretest outcomes and discuss the transition to SHARE 2.0.

Day 1 began with welcoming remarks from the Slovakian Country Team and an overview of project affairs. Discussions revolved around future survey wave design, innovative research proposals such as *Understanding and Mitigating Multimorbidity in Europe*, and updates on regional data initiatives. A presentation highlighted funding opportunities and research priorities in ageing, emphasizing cross-national studies, the exposome's role in Alzheimer's disease, and support for internationally harmonized studies like the Harmonized Cognitive Assessment

Protocol (HCAP), including insights into the plan for SHARE-HCAP II. The afternoon sessions focused on enhancing SHARE's digital infrastructure and scientific dissemination efforts, with operational topics and side meetings addressing key areas such as record linkage, progress reports, and effective networking strategies.

Day 2 featured exclusive sessions for Country Team Leaders and updates from the Management Board and Scientific Monitoring Board, concluding with insightful remarks highlighting collaborative efforts and strategic initiatives. The meeting was rounded off with a statement from the Scientific Monitoring Board of SHARE acknowledging the efforts made during the transition from Munich to Berlin and appreciating the plans for the multi-mode future of SHARE.



SHARE Wave 10 Post-Pretest Meeting 25-27 October 2023 in Bratislava, Slovakia

SHARE-ERIC AND THE ERIC FORUM 2

Behind the Horizon 2020 – the ERIC Forum Project 2

In 2023, the successor of the ERIC Forum project started: ERIC Forum 2. The ERICs (European Research Infrastructure Consortia) represent one of the leading science policy voices in Europe and play a key role in structuring the research infrastructure landscape. Following the successful set-up and implementation of the ERIC Forum (2019-2022), further efforts will consolidate its achievements and expand the coordination and monitoring of the ERICs. This project aims to structure the cooperation between ERICs, support the implementation of the ERIC Regulation and ERICs services, and consolidate the integration of the ERICs in the European Research Area by deepening the ERIC Forum's contribution to research policies. To reach its objectives, the project relies on a multi-disciplinary consortium involving all identified ERICs, both multi- and single-sited, and representing the five science clusters of the ERICs. The project is struc-

tured in four thematic pillars:

1. Monitoring and Reporting
2. Reinforcing European research infrastructure policy and international cooperation
3. Implementing the ERIC Regulation, strengthening capacities and identifying possible shared resources
4. Coordinating the project, ERIC Forum Executive Board secretariat and communication

The activities carried out within the project will ensure the implementation of specific results on three key target groups: the ERICs and ERICs-to-be, in order to increase their knowledge and propose solutions for key aspects of the ERIC Regulation implementation; the policy-makers and stakeholders by setting-up and managing the new ERIC Forum monitoring and reporting platform, thus ensuring an easy access to updated and consolidated data

and information about the ERICs, as well a further strengthened role in the European science policy; and finally the users, as the project will investigate the sustainability and open access of its services, as well as address the challenges related to the commercial aspects of service provision.

SHARE-ERIC is involved in the ERIC Forum 2 activities through its affiliated entities: SHARE BERLIN Institute and the SGH Warsaw School of Economics. We particularly contribute to the topics related to the ERIC alignment on EU policy priorities and visibility in the national arena, capacity-building programme for ERICs personnel upskilling, including shared solutions to privacy and data protection challenges, gender equality plans, their development and implementation, and recommendations related to the employment contracts and practices. SHARE-ERIC participated in the first annual ERIC

Forum 2 meeting, where the progress on the implementation of the project was presented. The meeting also gave opportunity to discuss common challenges and sharing of best practices across priority topics: international cooperation, green transition, fostering career development, visibility, and data security.

The ERIC Forum provides an important opportunity to exchange practices and experiences between ERICs. Despite different fields and modes of operations, many challenges that ERICs face are similar, and the common voice, especially in dialogue with the European Commission and other stakeholders gains more visibility.

More information about the ERIC Forum can be found here: <https://www.eric-forum.eu/>

SHARE PUBLIC RELATIONS AND SCIENTIFIC DISSEMINATION

Communicating effectively with different stakeholders

Adequate communication is key for SHARE. The SHARE Public Relations (PR) team must balance the needs of numerous internal and external project partners as well as different target groups. To keep scientists, the media, the general public, SHARE country teams, the EU and national ministry officials and respondents up-to-date with the developments around SHARE, sound and consistent communication is essential. Therefore, the SHARE PR team continues to address these diverse audiences with targeted (online) content and works to establish sustainable dialogue-oriented communication channels. This is done through strategic cooperation with the other departments as well as through own projects.

To complement the PR efforts and specifically facilitate the dissemination of SHARE data and research results, a Scientific Dissemination team was formed in April 2023 to establish an institutionalized connection between the communication and research units. Together, the PR team and the Scientific Dissemination team pursue effective communication strategies through targeted outreach designed for different groups of stakeholders. They seek to increase the visibility of SHARE in different mediums and publications.

Jointly, the PR team and Scientific Dissemination team maintain and publish the SHARE Working Paper

Series, which provides a platform for SHARE-affiliated researchers to publish first results, as well as technical papers written by the SHARE Central coordination team. Six working papers were published in 2023. Topics included the economic and health effects of the Covid-19 pandemic, technical papers on the measurement of physical activity, sampling, and multiple imputations and a methodological paper on machine-learning approaches.

In addition to SHARE's own publications, the outreach efforts promote SHARE-related articles in international publications. A recent example from 2023 is an interview with the SHARE BERLIN Institute Director of Infrastructure, David Richter, published in the periodical, *EU Researcher*.

2023 also saw the launch of a new webinar, the SHARE International Seminar Series (SISS), which promotes SHARE-based research and brings together SHARE researchers and the broader scientific community. The inaugural series started in November 2023 and continues with monthly presentations through the academic year of 2023-24. The first two seminars were held in 2023, attracting an on-line attendance of 60-80 participants. The webinars provide opportunities for scientific exchange and debate on SHARE-related substantive and methodological topics.

SHARE; a window into the ageing process

More and more of us are living for longer, raising important questions about how people can maintain a good quality of life into their old age. The SHARE infrastructure brings together health and socio-economic data on people over the age of 50 across 27 European countries and Israel, providing valuable insights into the ageing process, as Professor David Richter explains.

The European population is ageing rapidly, raising important questions about how to fund pensions, healthcare, and long-term care systems and help individuals maintain a good quality of life into their old age. The Survey of Health, Ageing and Retirement in Europe (SHARE) is a research infrastructure that provides rich data for valuable insights into the health and socioeconomic circumstances of people over 50 across Europe. The international coordination is based at the SHARE Berlin Institute, located in Berlin, Germany. In SHARE, interviewees in 28 countries go to randomly selected households drawn from public databases, mostly from official person registers covering the population of interest. The SHARE data are based on full probability samples, providing internationally comparable and representative data," outlines Professor David Richter, Director of the SHARE Infrastructure. The interviewees ask a standardized set of questions and gather data on individual health. "We have devices to measure gait strength or accelerometry, and we do some wave-specific medical tests, such as asking people to get up off a chair three or four times without using their arms for five times," says Professor Richter. "We also have a battery of cognitive performance and functional performance measures, for instance a word recall question."

SHARE consortium
The SHARE data provide a comprehensive picture of people's physical, mental, and cognitive health, alongside information about their social and economic circumstances, which can also be used to guide and inform policy. Since its inception in 2004, interviews have been conducted with respondents every two years in nine regular waves of data collection. In 2020-21, two additional waves were conducted about their income and expenditures. We have information on the number of generations living in household, and there are considerable differences across Europe in this respect," says Professor Richter.

The European population has changed significantly over recent years, with many countries seeing a large influx of refugees, such that it is also important to bring new people into the survey to reflect these wider demographic shifts. Alongside refreshing the sample, Professor Richter highlights that new questions may need to be added from time to time. The aim is to strike the right balance between maintaining stability in the questions, so as to provide a picture of development over time, while at the same time bringing in new questions to reflect emerging concerns such as climate change, which can have a significant impact on older people. "Many European countries have experienced increasingly intense heatwaves over the last few years, which are a

health risk to older people. It might be that we want to ask about their living situation, do they have air conditioning for example? We would need to think of new questions to cover such emerging challenges," says Professor Richter.

The SHARE data help researchers to portray a fuller picture of the ageing process and uncover new insights into how people can maintain their independence for longer, reducing the pressure on countries' health- and long-term care systems. SHARE data are available to researchers free of charge, and they have been used in almost 4,000 publications. Instructions for registering as a data user can be found on the SHARE website: <https://share-eric.eu/data/become-a-user>. "Researchers can study anything covered by the SHARE dataset and publish papers with it. Some researchers have looked at the connection between physical activity and cognitive function, while others have looked at the impact of the Covid pandemic on loneliness," outlines Professor Richter. The second pillar of uses of SHARE data is to inform policy development. "Policy makers can use the data to inform their decisions. Policy making is about more than just data and numbers of course, but information is needed, for issues such as retirement savings, health and healthcare needs and older adults' social networks to name but a few" continues Professor Richter.

Future of SHARE
The SHARE data has been used specifically for such questions, for example with researchers providing advice to the German and French governments on pension reform, which can be a highly contentious, divisive issue. While ultimately these are political choices, Professor Richter believes that evidence from the SHARE infrastructure can play an important role in informing and guiding the decisions of policy makers. "With more people living for longer, and the working population shrinking in relative terms, decisions have to be made," he says. The survey was initially funded for a 20-year term, due to end in 2024, but it will now be extended further, putting SHARE on a more secure long-term footing. In March 2021, SHARE became the first European Research Infrastructure Consortium (ERIC). This gave the SHARE data collection project a legal personality and capacity in all EU member states and participating associated countries. Moreover, SHARE-ERIC, headed by SHARE's founder Professor Börsch-Sapain and one of the few "European Landmark Research Infrastructures", serves as the main funding channel for SHARE. "Since 1 January 2023, we have also established the new SHARE Berlin Institute, with additional funding from the German Ministry for Education and Research for the international coordination of the survey" continues Professor Richter. While some aspects of SHARE are highly centralized, data are collected by highly committed, locally based teams across the 28 countries. "There are lots of very competent and interesting people from different countries working in SHARE," says Professor Richter. Their work has established SHARE as an invaluable resource for researchers, yet at the same time Professor Richter says there is a need to bring in fresh ideas to demonstrate the continued relevance of the infrastructure. While continuing to provide a stable and reliable panel database covering long term socio-economic and health issues, there is a need to modernize the SHARE infrastructure to benefit from technological innovations in survey methodology. By meeting this challenge, we expect the SHARE infrastructure to maintain its position as one of the most valuable data sources for Europe's policy makers and the scientific community.

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David Richter

David Richter is the Director SHARE Infrastructure at the SHARE Berlin Institute and a Professor of Survey Research at the Free University Berlin. As a psychologist, he is interested in the development of emotional well-being, and life satisfaction across the adult lifespan and the influence of life events on the development of well-being.

SHARE
SURVEY OF HEALTH, AGEING AND RETIREMENT IN EUROPE

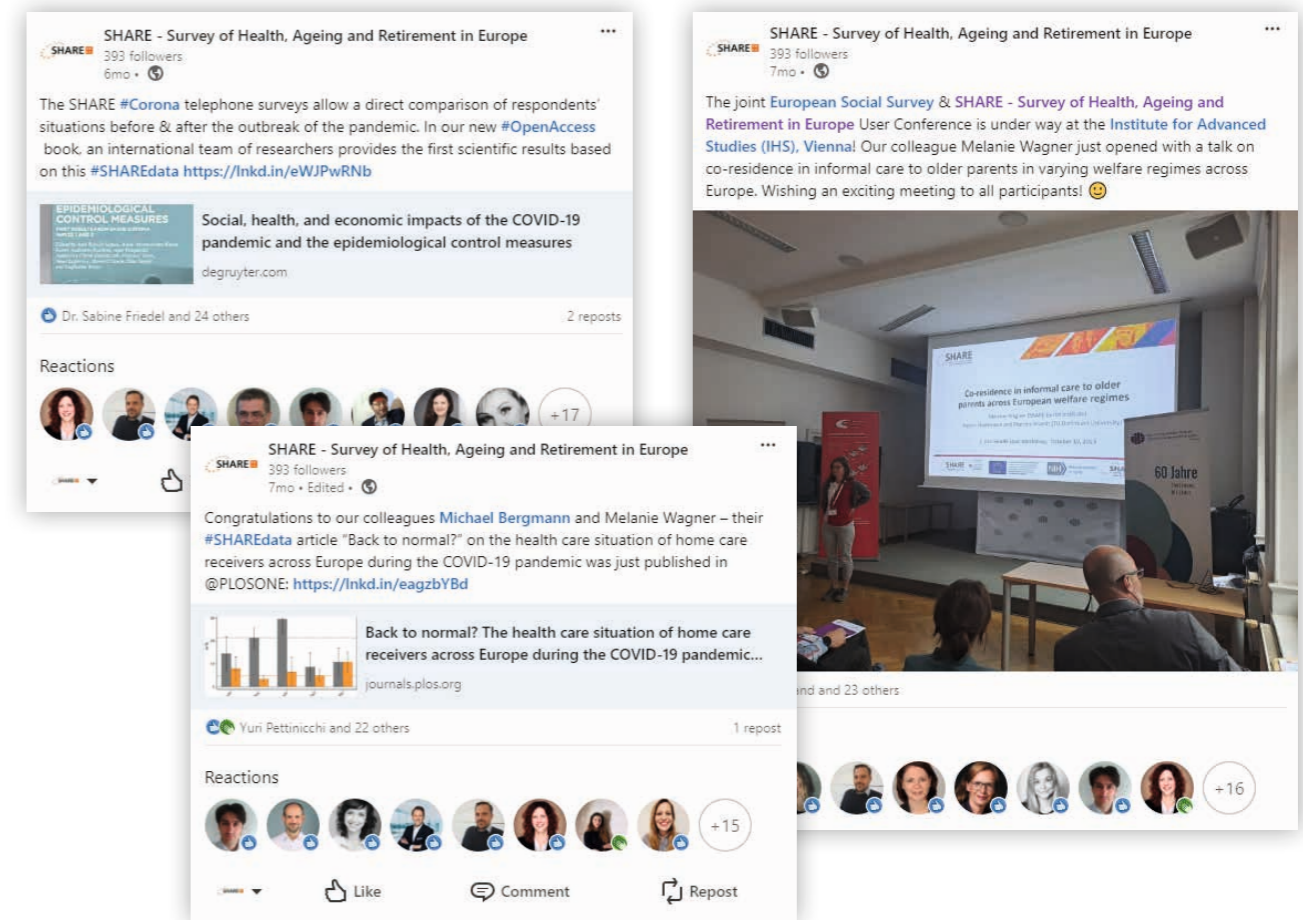
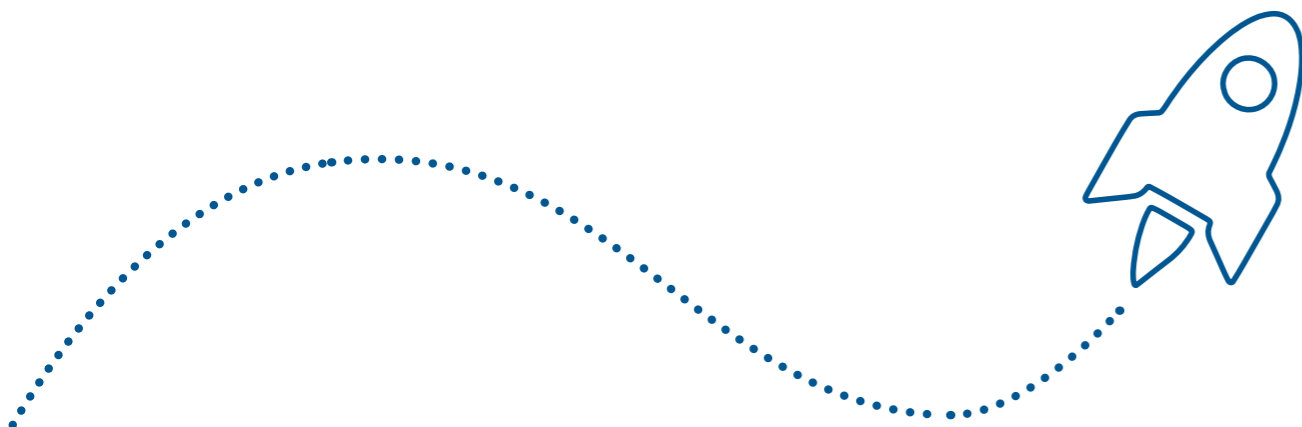
EU Research
www.euresearcher.com

Being active on social media

Over the years, SHARE developed various social media formats tailored to ensure visibility across different domains. These have helped to engage with international researchers and policy makers and have included news of online events and publications, exchange with partner projects, job vacancies and scientific updates. Throughout the last reporting period, the PR team ensured the visibility of the survey through its online channels on X and on LinkedIn. SHARE’s social media community consists mainly of researchers around the world, who use SHARE data. The PR team engages in online networking with researchers, for example by reposting their SHARE-based research or informing about scientific events. These activities benefit SHARE by extending its reach to an even wider global network. Overseeing and managing all social media activities, the PR team also engages with the SHARE country teams.

PR Support for Conferences

Whenever SHARE and its researchers are represented at a conference around the globe, the PR team and the Scientific Dissemination team support these activities. This includes the social media coverage before, during and after the event, as well as designing and distributing PR materials and serving as a first point of contact for questions. To this end, we conceptualised and supervised SHARE’s info booth, distributed information and promotional materials at the Annual Conference of the European Survey Research Association (ESRA) in July 2023 in Milan, Italy. Furthermore, the SHARE BERLIN Institute organised and hosted a first meet-and-greet workshop with its Shareholder Institutes in April 2023 in Berlin, Germany. Additionally, the Scientific Dissemination team and PR team have created, and are constantly updating, a standard introductory presentation for SHARE that can be used by researchers to present SHARE at conferences.



PROJECTS AND COOPERATIONS

Overview of SHARE's current international projects and cooperations

Current SHARE Projects

SHARE-COVID19

(The project has started on 1 November 2020 and will end on 30 June 2024)

The overarching objective of the SHARE-COVID19 project is to understand the non-intended consequences of the epidemic control decisions to contain the COVID-19 pandemic and to devise improved health, economic and social policies. The project pursues a transdisciplinary and internationally comparative approach by exploiting the data sources of the SHARE research infrastructure. It covers all EU Member States. For more information, also see p.31-33.

SHARE HCAP



(The project started on 30 September 2017 and will end on 30 April 2024)

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 aging surveys supported by NIA. 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. For more information, also see p.37-38.

SHARE COHESION

(The project started on 1 October 2019 and will end on 30 September 2024)

The overarching aim of this project is to strengthen the centralised approach of SHARE in order to combine scientific excellence with cohesion across all 28 SHARE member countries. Apart from integrating European countries into SHARE and SHARE-ERIC, the project aims to improve the technical architecture, introduce scientific innovations and support central coordination, which is crucial for international cooperation and cross-national comparability. The objectives for SHARE Waves 8, 9, and 10 are supporting the supranational innovation and development tasks to be executed by the Area Coordinators (scientific content), supporting the survey designers (fieldwork methods and electronic tools), training that is instrumental for internal cohesion (especially in the scientifically less developed Member States and their participating SMEs), and that became even more important during the COVID-19 pandemic, adaptation and revision of scientific content, electronic tools, interview mode, and the training procedures, plus implementation of the first SHARE Corona Survey including data release.

SHARE-EUCOV

(The project started on 4 November 2022 and will end on 3 September 2024)

EUCOVII is the follow-up project of EUCOV. The overall aim is to maintain full EU coverage in SHARE Wave 10 to provide the largest possible SHARE database to the research community, the European

Commission, and supranational organisations. This includes all final preparations and the start of the main data collection of Wave 10, data cleaning, and data release of SHARE Wave 9 in 11 SHARE member countries. The overall aim will be achieved by extending the support of DG Employment, Social Affairs and Inclusion in the eight EU member states that joined SHARE in Wave 7 (BG, CY, FI, LT, LV, MT, RO, SK) with the exception of Latvia, which was able to secure national funding for Wave 10, and in four "crisis countries" (EE, ES, GR, PT).

Current Project Cooperations

ERIC-Forum

(The project started on 1 September 2023 and will end on 31 August 2027)

The ERICs, under the umbrella of the ERIC Forum, represent one of the leading science policy voices in Europe and play a key role in structuring the research infrastructure landscape. Following the successful implementation of the ERIC Forum (2019-2022), the follow-up project started in 2023: ERIC Forum 2. This project aims to structure the cooperation between ERICs, support the implementation of the ERIC Regulation and ERICs services, and consolidate the integration of the ERICs in the European Research Area by deepening the ERIC Forum's contribution to research policies. To reach its objectives,



the project relies on a multi-disciplinary consortium involving all identified ERICs. SHARE-ERIC is involved in the ERIC Forum 2 activities through its affiliated entities: SHARE BERLIN Institute and the SGH Warsaw School of Economics. For more information, also see p.76-77.

GLOBAL NETWORK OF AGEING SURVEYS: SHARE'S GLOBAL SISTER STUDIES

This joint effort aims to strengthen the cooperation within the global network of other ageing surveys tackling the same issues relevant for individual and population ageing such as health, disability, retirement, active ageing, family and social support. The global network of ageing surveys (called "sister studies" altogether) consists of "parent surveys" and "daughter surveys" with respect to SHARE. The "parent surveys" have been started earlier than SHARE and have influenced the design of SHARE, namely the US Health and Retirement Study (HRS) and the English Longitudinal Study of Ageing (ELSA), while SHARE has strongly influenced the design of the Japanese Study on Aging and Retirement (JSTAR) and other "daughter surveys". Other sister studies are NICOLA and HAGIS in the UK, TILDA in Ireland, CHARLS in China, ELSI in Brasil, KLoSA in Korea, LASI in India, MHAS in Mexico, AL-SEHA in Egypt HAALSI in South Africa, MARS in Malaysia, and HART in Thailand.

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

SHARE is a very broad research infrastructure which serves many different user groups. SHARE is not only a social survey but includes sophisticated (and thus expensive) measures of health. It also reflects the desire of the Commission to cover all EU member states in spite of large differences in the ability to fund SHARE.

The financial aspects described in this section reflect this diversity. Some countries have several funders; other countries are subsidized by European Commission funds. Altogether, SHARE has over 50 different sources of funding. Some funds go directly from a member country to the country team or a survey agency without showing up in the books of SHARE-ERIC. Other funds are administrated by the ERIC for harmonization, governance and tax reasons but finance expenditures in the SHARE member countries. Yet other funds are used to finance

the administrative tasks of SHARE-ERIC. Figure X1 gives a schematic overview of the monetary flows in SHARE.

The largest expenditure item in SHARE are the costs of the survey and the country. According to the SHARE-ERIC Statutes, they have to be carried by the member countries. Some do this directly, but most countries give the survey contributions to the ERIC which procures, contracts and pays the survey agencies. Some countries are not able to pay the full costs of the survey. They are subsidized by the Commission through annual grants by DG Employment (called EU COV for “European Coverage”) that are given to the SHARE-ERIC.

Since DG Research has ended supporting routine expenditures of research infrastructures, the member countries pay such expenditures through the par-

ticipation fee (until 2024; from 2025 through the membership fee). In some countries, DG Employment paid a share of this fee. It amounted to about €750k in 2023 and covered the costs of software programming and IT support of the SHARE survey in the Netherlands. In addition, the membership fee covers the financial and legal administration of the legal entity SHARE-ERIC which amounted to about €280k in 2023.

Since 2023, the central international coordination of SHARE takes place at the newly founded SHARE Berlin Institute GmbH (SBI) in Germany and is funded by the German Ministry of Research and Education (BMBF). Costs are about €2.0m annually, covering the routine expenditure of the central coordination of SHARE. These costs are transferred directly from the BMBF to the SBI without an involvement of the ERIC.

Finally, the SHARE-ERIC receives grants for specific purposes in research, innovation and development, based on competitive project proposals. A first example is the overarching further development of the survey instrument in the health, economic and social areas that is funded by DG RTD’s project grant named “SHARE-COHESION”. Another example is the coverage of the Covid-19 pandemic that has been funded via Max Planck by DG RTD’s project grant named “SHARE COVID-19”. A third project grant named “SoGreen” that has been submitted together with the ESS ERIC and further “ERIC’s to be” - GGP

and GUIDE - was submitted in March 2024, with expected announcement of the funding decision in August 2024. SHARE also received a project grant from the US National Institute on Aging. This grant funds the measurement of cognitive decline and dementia (HCAP) and is coordinated by MPISOC/MPG (Emeritus Axel Börsch-Supan). Altogether, these project grants amounted to about €3.5m in 2023.

The SHARE-ERIC thus administrates three groups of incomes for three groups of expenditures:

1. Contributions by most member countries and additionally DG EMPL for the survey operations in each country,
2. Participation and membership fees from the countries and DG EMPL for the routine tasks of SHARE,
3. Grants from DG RTD and US NIA for specific research projects.

For the sake of transparency, the annual financial report for the most recent year and the annual spending plan for the current year are set up as profit and loss statements with the income sources on the left and the expenditure items on the right hand, structured by the above three groups of incomes and their associated expenditures, with a profit/loss balance in each section. The scheme corresponds to the Annex 3 in the revised interim SHARE-ERIC Statutes that will go into force on 1 January 2025 and is displayed in Figure X2.

Figure X1: Monetary flows of funds in SHARE

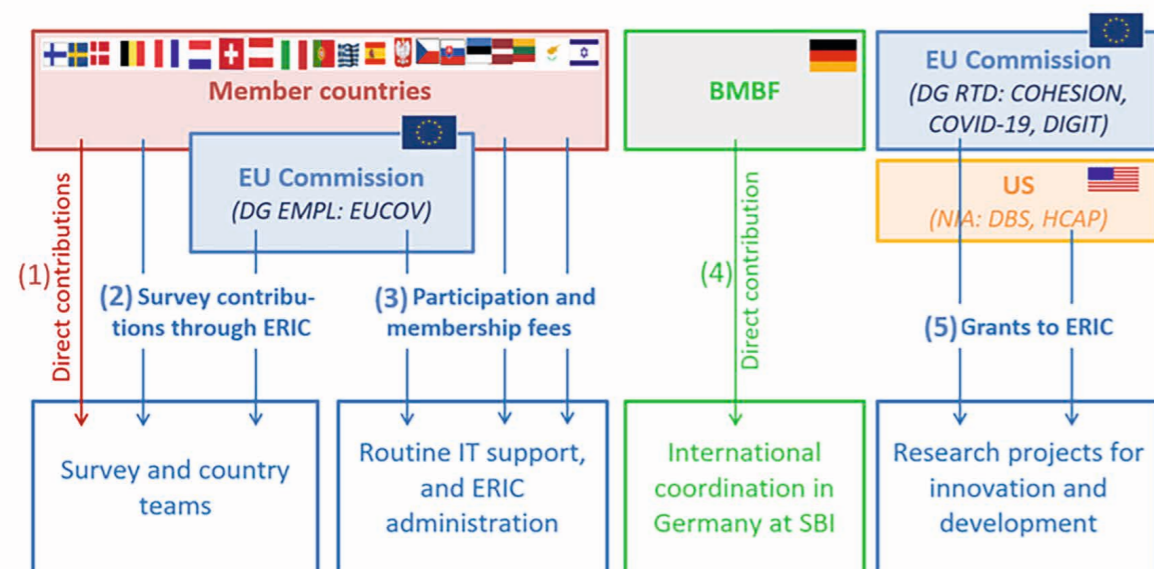


Figure X2: Schematic profit and loss statement of the SHARE-ERIC

	Income	Expenditure
Section 1: Survey contributions	Survey contributions received by SHARE-ERIC from SHARE member countries, the EU-Commission and other granting institutions Sum of all incomes	Expenditures financed by survey contributions to SHARE-ERIC, itemized by SHARE member country Sum of all expenditures Balance
Section 2: Participation fee	Fee income received, itemized by SHARE member country Sum of all incomes	Expenditures financed from fee income, separately for ERIC administration and other common costs as defined in Article 11 (4), itemized by purpose Sum of all expenditures Balance
Section 3: Grants	Income from EU-Commission and other grants received by SHARE ERIC according to Article 11 (5), excluding survey contributions, itemized by grant Sum of all incomes	Expenditures financed from grants, itemized by recipient and purpose Sum of all expenditures Balance

FINANCIAL REPORT FOR SHARE-ERIC 2023

Figure X3 presents the profit/loss statement for the previous year 2023. It is structured according to Figure X2.

1. Survey contributions

SHARE receives survey contributions from the member countries, from DG EMPL. In 2023, we were also able to dissolve additional funds (190k) from the US NIA “Enhance” grant that were earmarked for SHARE-ERIC as a subaward through MPISOC before the interruption of the pandemic in Wave 8, and a large carry-over surplus from 2022. In normal years, the survey contributions more or less exactly correspond to the expenditures for the survey in each country since the SHARE-ERIC only serves as an intermediary and procurer of the services by the national survey agencies. However, due to the survey schedule with Wave 9 ending in late 2022 and only some final payments taking place in 2023, the survey expenditures in 2023 were smaller than the survey contributions, leaving a surplus of about €1.4m, to which Wave 10 contributions will be added in 2024, see the Annual Spending Plan for 2024 in Figure X4.

2. Membership and participation fees

All member countries except three (Cyprus, Greece and Germany) have paid their 2023 membership fees as of 29 May 2024. 20 countries paid their participation fees according to the fee schedule that was established in 2022. DG EMPL paid a share of the participation fee for the remaining 7 countries, but – as opposed to earlier years – not the full amount. Total fee income in 2023 was about €859k.

These fees are used to pay the SHARE-ERIC administration, the routine IT services of Centerdata, and data protection obligations of the SHARE-ERIC. Total expenditures were about €816k, such that the year 2023 ended with a surplus of about €43k.

3. Grants

In 2023, SHARE-ERIC was the beneficiary for four major grants, all of which will expire in 2024. DG EMPL supported the international coordination at SBI and Centerdata of those countries which did not pay their participation fee. DG RTD supported innovation and development of the normal SHARE waves with the “SHARE COHESION” grant. The data base construction at SBI GmbH and the scientific analysis at other SHARE “Linked Third Parties” of the data collection of the second COVID-CATI telephone interviews during the pandemic has been funded by DG RTD and coordinated by Max-Planck-Society (Emeritus Axel Börsch-Supan) and with a no-cost extension until 30 June 2024, with the “SHARE-COVID-19” grant. The US National Institute for Aging supported the measurement of cognitive decline and dementia with the “HCAP” grant awarded also to Max-Planck-Society (Emeritus Axel Börsch-Supan), the data collection itself being funded by a subaward to SHARE-ERIC and data base construction by a subaward to SBI GmbH. Together, grant income was about €3.3m., which was spent almost exactly except for some remaining funds which will be spent at single beneficiaries during the last months of the no-cost extensions of SHARE-COHESION (ending 30 September 2024) and SHARE-COVID19 (ending 30 June 2024).

Figure X3: Profit/Loss Statement for 2023

1. Survey contributions from countries and DG EMPL in 2023				
Country	Income 2023	From country	From DG EMPL EU/COV	Amount
AT		150.000,00 €		298.226,48 €
BE*		-	-	160.835,77 €
CZ		-	-	-
DE		-	-	-
FR		262.568,36 €		262.568,36 €
GR				177.550,90 €
IL*				
IT		250.000,00 €		412.897,09 €
NL		104.361,24 €		104.361,24 €
PL		129.771,38 €		329.954,38 €
SE		-	-	-
SI		297.480,00 €		150.446,36 €
CH*				
BG		15.338,00 €		20.744,80 €
CY				12.924,00 €
DK*				
EE				293.016,81 €
ES				94.670,84 €
FI		60.000,00 €		42.331,66 €
HR		196.428,80 €		196.428,80 €
HU		97.475,00 €		103.475,26 €
LT				
LV				
LUX*				
MT				36.451,80 €
PT				126.796,41 €
SK				
RO				6.221,06 €
Total income		1.568.422,78 €	4.323.173,56 €	2.829.902,02 €
Balance				1.493.271,54 €

*direct contribution

2. Membership and participation fees 2023				
Country	Income 2023	Participation fee	DG EMPL EU/COV II	Amount
AT		28.500,00 €		470,95 €
BE		5.000,00 €		4.995,00 €
BG		38.000,00 €		26.142,03 €
CH*		5.000,00 €		43.000,00 €
CY		* not member		11.329,45 €
CZ		not paid		18.395,16 €
DE		5.000,00 €		64.248,54 €
DK*		not paid		13.016,46 €
EE*		* not member		1.206,06 €
ES*		* not member		3.684,50 €
FI*		* not member		703,72 €
FR		5.000,00 €		874,45 €
GR		not paid		4.200,00 €
HR		5.000,00 €		2.835,84 €
HU		5.000,00 €		6.036,70 €
IL		5.000,00 €		108,90 €
IT		5.000,00 €		273.790,22 €
LV*		* not member		
LU*		* not member		
MT*		* not member		
NL		5.000,00 €		
PL		5.000,00 €		
PT*		* not member		
RO*		* not member		
SE		5.000,00 €		
SI		5.000,00 €		
SK*		* not member		
Carry-over Surplus 2022		152.834,11 €		542.314,05 €
Totals		217.884,11 €	551.000,00 €	816.104,27 €
Total income				481.795,85 €

3. Grants 2023				
Name	Income 2023	NIA	DG EMPL	Amount
EU/COV II	DG RTD	NIA		227.475,00 €
COHESION				
SHARE-COVID-19				
HCAP				
Carry-over Surplus 2022				
Totals				3.353.033,06 €
Total income				- €

SPENDING PLAN FOR SHARE-ERIC 2024

Figure X4 presents the expected profits and losses for the year 2024. It is structured exactly the same way as Figures X2 and X3.

1. Survey contributions

In 2024, SHARE-ERIC will receive further survey contributions from the member countries and from DG EMPL for survey expenditure of the Field Rehearsal and the start of SHARE Wave 10. SHARE Wave 10 and Wave 11 contributions are also reflected in the carry-over surplus from 2023 (1.4m). Total contribution income including the carry-over is about € 6.3m including again the last Wave 8 remainder from the US NIA “Enhance” subaward through MPISOC (400k).

Except for minor early contributions towards Wave 11, all of this will be spent for the completion of Wave 10 in 2024 and 2025, expenditure totaling about €3.7m in 2024 if negotiations with DG EMPL to cover the remaining shortfall in income of about 751k for the weak countries are successful. Concerning the situation of SHARE in the countries funded partially by DG EMPL until now, please see also under survey contributions in 2025.

2. Membership and participation fees

Membership and participation fees have been changed in December 2022. The membership was reduced from €10,000 to €5,000, while the participation fee was increased from €15,000 to €28,500

for the mid-sized countries, as part of the transition to a unified membership fee for all participating countries. We expect all member countries except Cyprus to pay their reduced 2023 membership fees (Note: Cyprus has already announced that it will leave SHARE-ERIC).

We expect 20 countries to pay their participation fees according to the fee decision of December 2022. DG EMPL will pay part of the participation fee for the remaining 7 countries. However, the budget of the possible upper limit of the planned grant application in 2024/2025 will be smaller than what is needed, which might create a shortfall in the fee income. Total fee income in 2024 is expected to be about €979k, including a carry-over of €43k (86k including arrears Germany) from 2023.

These fees are used to pay the SHARE-ERIC administration, the routine IT services of Centerdata, and data protection obligations of the SHARE-ERIC. Total expenditures are expected to be about €1.0m. We expect some countries to pay at least the indicated minimum fees.

3. Grants

The annual grant income for innovation and scientific development in 2024 will be about 700k. Expenditures for these grant projects will exactly exhaust this income.



Figure X4: Expected Profit/Loss Statement for 2024

1. Survey contributions from countries and DG EMPL					2024	
Country	Income 2024		From country	From DG EMPL ?	Expenditures 2024	
	Membership fee	Participation fee			Country	Amount
AT	37,500.00 €	5,000.00 €	500,000.00 €		AT	354,200.00 €
BE*	5,000.00 €	5,000.00 €			BE*	135,006.75 €
BG	5,000.00 €	5,000.00 €	684,025.00 €		CZ	684,025.00 €
BG*	* not member	* not member	298,900.00 €		FR	298,900.00 €
CZ	5,000.00 €	5,000.00 €		106,146.19 €	GR	106,146.19 €
DE	5,000.00 €	5,000.00 €	250,000.00 €		IL*	177,405.00 €
DE*	* not member	* not member	119,535.00 €		IT	119,535.00 €
DK	5,000.00 €	5,000.00 €	225,012.00 €		NL	225,012.00 €
DK*	* not member	* not member	299,009.00 €		PL	299,009.00 €
EE	5,000.00 €	5,000.00 €	178,200.00 €		SE	109,762.50 €
EE*	* not member	* not member	- €	31,488.25 €	SI	31,488.25 €
ES	5,000.00 €	5,000.00 €	- €	28,975.00 €	BG	28,975.00 €
ES*	* not member	* not member	- €	152,010.05 €	CY	152,010.05 €
FI	5,000.00 €	5,000.00 €	100,000.00 €		EE	132,250.00 €
FI*	* not member	* not member	- €	117,940.00 €	ES	117,940.00 €
FR	5,000.00 €	5,000.00 €	112,020.00 €		FI	112,020.00 €
FR*	* not member	* not member	- €		HR	47,387.50 €
GR	5,000.00 €	5,000.00 €	- €	124,741.75 €	HU	47,387.50 €
GR*	* not member	* not member	- €		LT	124,741.75 €
LU*	5,000.00 €	5,000.00 €			LV*	40,085.00 €
LU*	* not member	* not member	- €	40,085.00 €	LUX*	40,085.00 €
MT	5,000.00 €	5,000.00 €	- €	57,621.16 €	MT	57,621.16 €
PT	5,000.00 €	5,000.00 €	- €	47,427.50 €	PT	47,427.50 €
SK	5,000.00 €	5,000.00 €	- €	44,504.00 €	SK	44,504.00 €
SK*	* not member	* not member	- €		RO	338,917.00 €
RO	5,000.00 €	5,000.00 €			Refreshments BG, CY, EE, ES, FI, LT, MT, RO	
RO*	* not member	* not member				
Refreshments BG, CY, EE, ES, FI, LT, MT, RO	218,493.00 €					
NIA Enhance Refreshments leftovers EMPL countries	400,000.00 €					
Carry-over Surplus 2023	1,493,271.54 €					
Totals	2,111,704.54 €	2,766,701.00 €		750,938.90 €		
Total income				5,629,344.44 €		3,784,368.65 €
*direct contribution						1,648,975.79 €

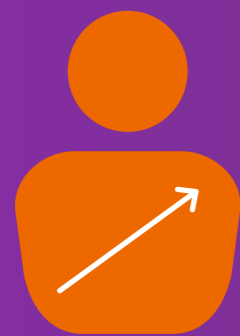
2. Membership and participation fees					2024	
Country	Income 2024		Participation fee	DG EMPL ?	Expenditures 2024	
	Membership fee	Participation fee			Cost item	Amount
AT	37,500.00 €	5,000.00 €	37,500.00 €		ERIC administration	500.00 €
BE	5,000.00 €	5,000.00 €	50,000.00 €		Account charges/transaction fees	6,500.00 €
BG	5,000.00 €	5,000.00 €	25,000.00 €		Auditor	30,000.00 €
CH*	* not member	* not member	50,000.00 €		Budget SMB/Travel and subsistence	43,000.00 €
CY	5,000.00 €	5,000.00 €		12,921.43 €	20% SHARE-ERIC Managing Director	120,000.00 €
CZ	5,000.00 €	5,000.00 €	25,000.00 €		1 FTE Head of Finance	77,000.00 €
DE	5,000.00 €	5,000.00 €	50,000.00 €		1 FTE Accountant ERIC	33,250.00 €
DK*	* not member	* not member	37,500.00 €		0.5 FTE SHARE-ERIC EU-Project Manager	3,865.00 €
EE*	* not member	* not member	50,000.00 €		Council meeting	1,000.00 €
ES*	* not member	* not member	50,000.00 €		Conference fees, travel and subsistence	1,000.00 €
FI*	* not member	* not member	50,000.00 €		Internet domains SHARE	4,200.00 €
FR	5,000.00 €	5,000.00 €	50,000.00 €		Design and print Annual Activity report	10,000.00 €
GR	5,000.00 €	5,000.00 €	25,000.00 €		SHARE-ERIC Website relaunch	1,400.00 €
HR	5,000.00 €	5,000.00 €	50,000.00 €		SHARE-ERIC Legal (legal advice, notary, translations, registry)	15,000.00 €
HU	5,000.00 €	5,000.00 €	50,000.00 €		SHARE-ERIC Office supplies	150.00 €
IL	5,000.00 €	5,000.00 €	50,000.00 €		Total	346,865.00 €
IT	5,000.00 €	5,000.00 €	50,000.00 €		Routine IT services software programming and SHARE-ERIC IT	
LV*	* not member	* not member	37,500.00 €		IT routine support: CentERdata Tilburg	625,000.00 €
MT*	* not member	* not member	50,000.00 €		Data protection company for agency checks	45,288.08 €
NL	5,000.00 €	5,000.00 €	25,000.00 €		IT support	4,500.00 €
PL*	* not member	* not member	50,000.00 €		Software Licences	400.00 €
RO*	* not member	* not member	50,000.00 €		Total	675,188.08 €
SE	5,000.00 €	5,000.00 €	50,000.00 €			
SI	5,000.00 €	5,000.00 €	25,000.00 €			
SK*	* not member	* not member	43,179.85 €			
Carry-over Surplus 2023	113,179.85 €			103,371.44 €		
Totals	1,131,179.85 €	762,500.00 €		979,051.29 €		
Total income						1,022,053.08 €
						43,001.78 €

3. Grants 2024						
Name	Income 2024		N/A	DG EMPL	Expenditures 2024	
	DG RTD	DG RTD			Country	Amount
EUCOV II				151,650.00 €	Staff at SBI for survey coordination new countries	151,650.00 €
SHARE-COHESION		548,819.05 €			IT support innovation: CentERdata	
					Economics Area: Padua	
					Economics Area: Venice	
					Health Area: Odense	
					Social Area: Jerusalem/Dortmund	
					Survey Mgmt/Methodology: Paris	
					Health Care Area: Wuppertal/MPISOC	
					SHARE-ERIC Admin: Madrid	
					SHARE-ERIC	
					Coordination at SBI	548,819.05 €
Totals		548,819.05 €		151,650.00 €		
Total income						700,469.05 €
						0.00 €

SHARE IN NUMBERS

FACTS & NUMBERS

Number of Registered Users



16,129
in year 2022

18,470
in year 2023

2022: **570**

2023: **450**

Processed User Requests 

User Workshops

2022: **27**

2023: **29**



User Countries

2022: **81**

2023: **89**



Publications

2022: **3,740**

2023: **3,971**

SSCI-ranked Publications

2022: **1,316**

2023: **1,456**



100%

100% of our own Publications are published as Open Access

Participating Countries

Full coverage of 28 countries since 2017 (W7)



Interviews

530,000
Wave 1 to 8

616,000
Wave 1 to 9

Policy Actors Using SHARE Data



2022: **630**

2023: **645**



Respondents

160,000

Global Sister Surveys:

18



Social Media Followers



Twitter

2022: 1,716
2023: 1,807



LinkedIn

2022: 166
2023: 250



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

SCIENTIFIC PARTNERS OF SHARE-ERIC MEMBERS



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 is labour economics, public economics and problems of pension reform as well as environmental economics. It is represented by Rudolf Winter-Ebmer, Professor of Economics and specialist in empirical labour economics.

BELGIUM – NL

University of Antwerp, CSB

CSB'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. Jérôme Schoenmaeckers is in charge of the SHARE project coordination in the Belgian French-speaking community.

BULGARIA

Institute of Philosophy and Sociology at the Bulgarian Academy of Sciences (IPS-BAS), Sofia

IPS-BAS, the former Institute for the Study of Societies and Knowledge at BAS (ISSK-BAS), conducts complex theoretical and empirical, fundamental and applied, philosophical, sociological, and science-studies-related research on knowledge, values,

man and society, in accordance with the academic, national, and European criteria and world trends in science, and trains highly qualified specialists in the academic disciplines of philosophy, sociology, science studies, and their sub-divisions. Country team leader for Bulgaria is Assoc. Prof. 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 the 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, Associate Professor at the Department of Economics and member of the academic council of CypERC, is the leader of the Cyprian country team.

CZECH REPUBLIC

Economics Institute (EI) of the Czech Academy of Sciences, Prague

The Economics Institute (EI) of the Czech Academy of Sciences in Prague is a joint work place with CERGE (Center of Economic Research and Graduate Education) of Charles University, Prague. Its main expertise is in social, economic and political transition in the Central and Eastern European countries. 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

SHARE BERLIN Institute (SBI) and Munich Research Institute for the Economics of Aging and SHARE Analyses (MEA)

Central coordination of SHARE takes place at the SHARE BERLIN Institute. SBI is a non-profit company conducting substantive and methodological

research at the interface between socio-economic and bio-medical research. David Richter, Professor of Psychology, is the Director SHARE Infrastructure at SBI. The German country team is part of the Munich Research Institute for the Economics of Aging and SHARE Analyses (MEA). MEA's research areas are savings, social insurance and public policy; macroeconomic implications of population ageing; and public health. Until 2025, MEA hosts SHARE-ERIC and SHARE Germany. MEA is represented by Axel Börsch-Supan, Professor of Economics. Arne Bethmann leads the German Country Team.

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

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 inter-

disciplinary 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 Chłoń-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. Apart 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 professor at CEDAR and leader for the Swedish country team.

SCIENTIFIC PARTNERS OF SHARE

DENMARK

University of Southern Denmark, Department of Economics, Odense

ESTONIA

Tallinn University, Estonian Institute for Population Studies, Tallinn

FINLAND

Väestöliitto, Helsinki
University of Eastern Finland, Joensuu and Kuopio

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, Department of Gerontology and Dementia Studies, Malta

PORTUGAL

University of Minho, Life and Health Sciences Research Institute (ICVS), School of Medicine, Braga

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

SWITZERLAND

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

VISIT YOUR COUNTRY TEAM ONLINE:

Austria	www.share-eric.eu/at
Belgium	www.share-eric.eu/be
Bulgaria	www.share-eric.eu/bg
Croatia	www.share-eric.eu/hr
Cyprus	www.share-eric.eu/cy
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National Institute
on Aging