

# **Statutes of the SHARE-ERIC**

## **Concerning the Building Up and Operation of the Survey of Health, Ageing and Retirement in Europe (SHARE)**

**Version for Amendment effective 01.01.2025**

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## **PREAMBLE**

The Republic of Austria  
The Kingdom of Belgium  
The Republic of Bulgaria  
The Republic of Croatia  
The Republic of Cyprus  
The Czech Republic  
The French Republic  
The Federal Republic of Germany  
The Hellenic Republic  
Hungary  
The State of Israel  
The Italian Republic  
The Kingdom of the Netherlands  
The Republic of Poland  
The Republic of Slovenia  
The Kingdom of Sweden

Hereinafter referred to as "the Contracting Parties",

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

Considering a report by the European Commission and the (ECOFIN) Council to the European Council of 2001 (Council of the European Union, Document 6997/01, 12 March 2001) which identifies population ageing and its social and economic challenges to growth and prosperity to be among the most pressing challenges of the 21st century in Europe, which points out serious infrastructure gaps in understanding individual and population ageing, and which then calls to *"examine the merits and feasibility of establishing a longitudinal survey on ageing based on an assessment of the Commission"* in order to foster European research on ageing;

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

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

Recognizing that evidence-based public policy making requires an up-to-date data infrastructure that monitors progress in health, economic, social and environmental policies on European and national levels;

Expecting other countries to participate in the activities undertaken together under the following Statutes;

Have agreed as follows:

### **Article 1 Establishment of a SHARE-ERIC**

- (1) There shall be a distributed European Research Infrastructure called the Survey of Health, Ageing and Retirement in Europe (SHARE).
- (2) SHARE shall have the legal form of a European Research Infrastructure Consortium (ERIC) incorporated under the provision of Council Regulation 723/2009 of 25 June 2009 and be named “SHARE-ERIC” (hereafter also referred to as “the Organisation”).

### **Article 2 Statutory Seat and Working Language**

- (1) The Statutory Seat of the Organisation shall be in Berlin, Germany.
- (2) The working language of the Organisation shall be English.

### **Article 3 Tasks**

- (1) SHARE-ERIC shall build an infrastructure of micro data of households and individuals necessary to understand individual and societal ageing (hereinafter also referred to as “the Survey”). Its main tasks are:
  - (a) to *design a core survey instrument* which captures the essential information on the economic, health, and family/social conditions of life of individuals aged 50 and older and their partners;
  - (b) to *administer this survey instrument* every two years to a panel of respondents in each participating countries and to maintain contact to all panel members between panel waves;
  - (c) to assemble the collected information in a *user-friendly data base* accessible to all scientific researchers subject to applicable data confidentiality restrictions and to maintain this data base including basic data cleaning, imputation, and documentation.
- (2) The current design of SHARE shall be continuously upgraded along the following dimensions:
  - (a) *prolong SHARE over time* in order to generate a genuine panel that follows individuals as they age and react to the changes in the social and economic environment.
  - (b) *expand SHARE to include all EU Member States*.
  - (c) *increase sample size of SHARE* in order to make the Survey usable also for with-in-country analyses. In general, the target sample size shall be 6000 individuals aged 50 and older in each member country.
  - (d) *remain state-of-the-art* in survey content and methodology.
- (3) The SHARE-ERIC shall pursue its tasks on a non-economic basis.

#### **Article 4**

##### **Principles**

- (1) SHARE shall be designed by researchers for researchers. Excellence in research is paramount to all other considerations. The scientific excellence of SHARE shall be monitored by an independent Scientific Monitoring Board (Annex 4).
- (2) SHARE shall be a supranational survey. Cross-national comparability within SHARE shall govern all design decisions. In addition, comparability with its sister surveys, notably the U.S. Health and Retirement Study and the English Longitudinal Study of Ageing, shall inform the design decisions of SHARE. Topics with supranational research potential shall have priority over topics applicable to single countries.
- (3) SHARE shall integrate economics, health, and social science. Topics with interdisciplinary research potential shall have priority over topics applicable to single disciplines.
- (4) SHARE shall be a longitudinal survey, following individuals as they age. Topics with longitudinal research potential shall have priority over topics applicable to single points in time.
- (5) Research based on SHARE shall facilitate evidence-based EU policies in order to help meeting the challenges of population ageing in all countries of the EU.

#### **Article 5**

##### **Bodies of the Organisation and Scientific Partner Institutions**

- (1) The bodies of the Organisation shall be:
  - the Council (Article 6),
  - the Management Board (Article 7),
  - the Assembly of the Country Team Leaders (Article 8), and
  - the Scientific Monitoring Board (Article 9).
- (2) The Scientific Partner Institutions are the host institutions of the Country Team Leaders. Relations between the Organisation and the Scientific Partner Institutions with their associated Country Team Leaders shall be governed by a consortium agreement.
- (3) The current Country Team Leaders and their associated Scientific Partner Institutions in the countries of the Contracting Parties are listed in Annex 1.

#### **Article 6**

##### **The Council**

- (1) Each Contracting Party shall be represented in the Council by up to two delegates. Delegates to the Council shall be appointed and have their appointments terminated by the Contracting Party. Each Contracting Party shall inform the Chairperson of the Council in writing of any appointment or termination of appointments of its delegates to the Council without undue delay.
- (2) Contracting Parties committing to pay the contribution required by Article 11 have one vote.
- (3) If a Contracting Party fails to pay its contribution due within 3 months after being summoned by the Managing Director of SHARE, its voting right will be suspended until full payment has been made.

- (4) Decisions shall be taken by simple majority voting unless otherwise determined in these Statutes. In case of a tie, the vote of the Host Country shall break that tie.
- (5) The Council shall elect a Chairperson and a Vice-Chairperson from the delegations of the Contracting Parties for a period of two years. With their election the Chairperson becomes *supra partes* and leaves the delegation of the Contracting Party. The Contracting Parties affected by these departures appoint another delegate to represent them in the Council.
- (6) The Council meets at least once a year. Meetings of the Council shall be convened by the Chairperson of the Council. Meetings of the Council shall also be convened at the request of at least two Contracting Parties. Extraordinary meetings of the Council may also be convened at the request of the Managing Director if it is required in the interest of the Organisation.
- (7) The Council receives and approves the annual report, the financial statement and the annual spending plan submitted by the Management Board. The Council shall review at least annually the actual and forecasted survey and operating costs. The Council acting unanimously may approve a modification of the contribution to common costs in the Annual Spending Plan (“Membership Fee”, Article 11 (4), and Annex 3).
- (8) The Council receives and acknowledges the annual activity plan, which contains the broad scientific aims of SHARE, the survey emphasis of the next wave, the certification process and the survey and dissemination schedule.
- (9) The Council elects with a qualified vote (at least two thirds of the Contracting Parties) the members of the Management Board for positions according to Article 7 (1) upon nomination by the Assembly of Country Team Leaders.
- (10) Further rules of procedure can be defined in the Bylaws of the Organisation.
- (11) Countries that have committed to SHARE-ERIC through signing a Memorandum of Understanding that commits to a future accession to SHARE-ERIC may become non-voting members of the Council as observers until they have acceded to SHARE-ERIC according to Article 18.

## **Article 7**

### **The Management Board**

- (1) The Management Board is composed of up to eleven members, including:
  - (a) the Managing Director of SHARE-ERIC (herein referred to as “the Managing Director”);
  - (b) the Director SHARE Infrastructure,
  - (c) Area Coordinators representing the scientific areas of SHARE;
  - (d) other scientists representing an important scientific field or an important operational centre of SHARE;
  - (e) the chairperson of the Assembly of Country Team Leaders.
  - (f) Personal unions between the above functions are possible. The Managing Director assigns one member of the Management Board to be Deputy Managing Director. Members (a) to (c) are elected for a period of five years, members (d) and (e) for a period of two years. Re-election is possible. The current list of Management Board members is in Annex 2.
- (2) Members of the Management Board shall be internationally reputable researchers with experience in research on ageing and/or survey management. SHARE shall seek diversity in the composition of the Management Board.

- (3) The Management Board proposes all strategic and budgetary decisions to the Council. It is responsible for all financial and governance processes which maintain scientific integrity, cross-national comparability, and an overall balance of the SHARE survey design. Specifically, it is accountable for the SHARE-ERIC's finances and deliverables, and for observing legal requirements such as data confidentiality and safety regulations at the European level.
- (4) The Management Board provides an annual report on the state of the Survey to the Council, proposes an annual spending and activity plan to the Council, and prepares the financial statement.
- (5) The Managing Director leads the Management Board and is the legal representative of the SHARE-ERIC.
- (6) The Director SHARE Infrastructure is responsible for implementing the Survey and for maintaining the same high methodological standards in all participating countries.
- (7) The Area Coordinators are responsible for the scientific excellence of the Survey in their respective scientific areas. Specifically, they are responsible for the questionnaire design in their respective areas and for the integrity of the data delivered to the scientific public.

## **Article 8**

### **The Assembly of Country Team Leaders**

- (1) The Country Team Leaders of all countries participating in SHARE constitute the Assembly of Country Team Leaders. The Assembly of Country Team Leaders generally meets twice a year. It contributes to and is consulted on all relevant scientific decisions of SHARE.
- (2) Country Team Leaders shall be internationally reputable researchers with experience in research on ageing and survey management. They are responsible for carrying out the tasks according to Article 3 in this country. This comprises in particular, but not exclusively:
  - (a) Channeling country-specific knowledge into SHARE;
  - (b) Funding and public relation activities for SHARE;
  - (c) Securing compliance of the national parts of the survey with all relevant laws, in particular data protection laws;
  - (d) Translation of the questionnaire in the national language;
  - (e) Collaboration in the selection of the national survey agency;
  - (f) Monitoring of the field work;
  - (g) Supporting the construction of the SHARE database.
- (3) The Assembly of Country Team Leaders elects a chairperson with the majority of at least half of the Country Team Leaders for a duration of two years. Re-election is possible.
- (4) The Management Board proposes new members of the Management Board for positions according to Article 7 (1) to the Assembly of Country Team Leaders. The Assembly of Country Team Leaders nominates these new members to the Council with the majority of at least half of the Country Team Leaders.

## **Article 9**

### **The Scientific Monitoring Board**

- (1) The Management Board shall seek advice of outside experts and establish a Board of at least six scientists who give advice in all scientific matters (the "Scientific Monitoring Board").

- (2) The Scientific Monitoring Board shall be independent from the SHARE-ERIC.
- (3) Members of the Scientific Monitoring Board shall be eminent, independent and experienced scientists. SHARE shall seek diversity in the composition of the Scientific Monitoring Board.
- (4) The main task of the Scientific Monitoring Board is to monitor the scientific quality of SHARE. It should give feedback to the Management Board and the Assembly of the Country Team leaders at least once per year.
- (5) Every two years, the Scientific Monitoring Board shall issue a written report to the Council of the SHARE-ERIC reviewing the scientific strategy of SHARE and exploring innovative fields and modes of data collection. This report shall also assess the services offered to the users of the SHARE data.
- (6) The Scientific Monitoring Board shall approve the selection and removal of Country Team Leaders and their associated Scientific Partner Institutions.
- (7) The current members and the current budget of the Scientific Monitoring Board are listed in Annex 4 of these Statutes.

## **Article 10**

### **Scientific Evaluation Policy**

1. Every six years, a scientific evaluation of SHARE-ERIC activities and services shall take place. The evaluation shall be done by a panel of independent international external evaluators of the highest quality. This panel will produce and submit the evaluation report to the Council.
2. The Scientific Evaluation Policy will be set out in the SHARE Bylaws to be adopted by the Council.

## **Article 11**

### **Contributions**

- (1) Each Contracting Party shall make available to the SHARE-ERIC, either directly or through the Scientific Partner Institution for which it is responsible, funds covering the Country's share of the survey costs ("data collection in each country").
- (2) Each Contracting Party shall make available to the Scientific Partner Institution for which it is responsible funds covering the Country's share of the operating costs ("personnel and related costs in each country").
- (3) The Federal Republic of Germany shall finance the central coordination costs of the Survey that occur in Germany ("SHARE Central").
- (4) Each Contracting Party shall make contributions to the SHARE-ERIC for all other common costs of the Survey to the extent that these are not covered by any other funding source ("Membership Fee"). This includes budgets for the Management Board and the Scientific Monitoring Board. The composition of the other common costs shall be detailed in the Annual Spending Plan according to Annex 3.
- (5) The SHARE-ERIC or the Scientific Partner Institutions, as a consortium, may react to calls from the European Commission, the U.S. National Institute on Aging, and other supranational and national funding organisations providing funds for the project as a whole, among those parts or all of the common costs mentioned in (4).
- (6) The contributions according to this Article including the Membership Fee for the upcoming wave will be determined by the Council upon proposal of the Management Board.

**Article 12**  
**Liability and Insurance**

- (1) The financial liability of the members for the debts of the ERIC shall be limited to their respective contributions provided to the SHARE-ERIC and agreed upon in the annual spending plans.
- (2) The SHARE-ERIC shall take appropriate measures to insure the risks specific to building up and operating a survey.

**Article 13**  
**Intellectual Property**

- (1) In accordance with the objects of the present Statutes the term "Intellectual Property" will be understood according to Article 2 of the Convention Establishing the World Intellectual Property Organisation signed on 14 July 1967.
- (2) The SHARE-ERIC is the owner of the Survey and all of its data, including add-ons certified by SHARE, meta and para data, all address and link files, of all publications issued by SHARE-ERIC including its websites, and of all intellectual property rights emanating from setting up and conducting the Survey.

**Article 14**  
**Dissemination and Use of the SHARE Data**

- (1) The SHARE-ERIC shall disseminate the collected data after data cleaning, imputation, and documentation according to Article 4(e) of the Council Regulation 723/2009 on the Community legal framework for a European Research Infrastructure Consortium, after taking account of international and national data protection laws, without delay to the scientific community.
- (2) Use of the SHARE data shall be free of charge to the entire scientific community. The Management Board shall ascertain that the interests of the scientific user community are taken into account in the reports by the Scientific Monitoring Board according to Annex 4.
- (3) Use and collection of the SHARE data is subject to European and national laws of data protection. With regard to the national data collection, processing and the subsequent dissemination of the data, SHARE-ERIC and the Scientific Partner Institutions act as "joint controllers" pursuant to Article 26 of the European General Data Protection Regulation. Use of the SHARE data by users who are not subject to Community legislation shall be conditional on signing a declaration of data confidentiality according to the form provided by the European Commission (Commission Implementing Decision (EU) 2021/914 of 4 June 2021 on standard contractual clauses for the transfer of personal data to third countries pursuant to Regulation (EU) 2016/679 of the European Parliament and of the Council).

**Article 15**  
**Procurement and Tax Exemptions**

- (1) The SHARE-ERIC shall treat procurement candidates and tenderers equally and in a nondiscriminatory way, independent of whether or not they are based in the European Union. All procurement shall follow the principles of transparency, non-discrimination and competition.
- (2) In general, procurement by the SHARE-ERIC shall be subject to Directive 2014/24/EU of



the European Parliament and of the Council of 26 February 2014 on public procurement, and the national procurement regulations, which apply.

(3) For the procurement of survey research and survey development services where the benefits accrue to the entire scientific community and which are wholly remunerated by the SHARE-ERIC, Article 14 of Directive 2014/24/EU shall be applied through a restricted procedure (Annex 5). In such restricted procedures, negotiated procedures with publication of a contract notice and in the competitive dialogue procedure, contracting authorities may limit the number of suitable candidates they will invite to tender, to negotiate or to conduct a dialogue with, provided a sufficient number of suitable candidates is available.

(4) Tax exemptions based on Articles 143(1)(g) and 151(1)(b) of Council Directive 2006/112/EC\*, and on Articles 50 and 51 of Council Implementing Regulation (EU) No 282/2011\*\*, shall apply to purchases of goods and services which are for the official use by the SHARE-ERIC, are procured and paid for by it and for which the amount of VAT to be reimbursed exceeds a total of EUR 25 per invoice. Procurement by individual members shall not benefit from these exemptions.

The first subparagraph shall not apply, however, so as to have the effect of distorting competition.

(5) Excise goods as defined in Points (b) and (c) of Article 1(1) of Council Directive 2020/262/EC\*\*\*, may be granted an exemption from payment of excise duty in accordance with point (b) of Article 11(1) of that Directive provided that those excise goods are intended exclusively for official use by the SHARE-ERIC and are procured and paid for by it.

No exemption from payment of excise duties shall be granted for excise goods intended for the personal use of the SHARE-ERIC employees or of third parties.

(6) Duties paid on energy products and electricity as defined in Article 1(1)(a) of Directive 2020/262/EC\*\*\*, may be refunded in accordance with Point (b) of Article 11(1) and Article 11(2) of that Directive, provided that those energy products and electricity are intended exclusively for official use by the SHARE-ERIC and are procured and paid for by it, and that the amount of the duty exceeds a total of EUR 25 per invoice.

No duty exemption shall be granted on energy products or electricity intended for the personal use of the SHARE-ERIC employees or of third parties.

## **Article 16 Employment**

(1) The SHARE-ERIC is an equal opportunity employer. Employment contracts shall follow the national laws of the country in which the staff is employed.

(2) Subject to the requirements of national legislation, each Contracting Party shall within its jurisdiction facilitate the movement and residence of nationals of the Contracting Party countries involved in the tasks of the SHARE-ERIC and of the family members of such nationals.

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\* Council Directive 2006/112/EC of 28 November 2006 on the common system of value added tax (OJ L 347, 11.12.2006, p. 1, ELI: <http://data.europa.eu/eli/dir/2006/112/oj>).

\*\* Council Implementing Regulation (EU) No 282/2011 of 15 March 2011 laying down implementing measures for Directive 2006/112/EC on the common system of value added tax (OJ L 77, 23.3.2011, p. 1, ELI: [http://data.europa.eu/eli/reg\\_impl/2011/282/oj](http://data.europa.eu/eli/reg_impl/2011/282/oj)).

\*\*\* Council Directive (EU) 2020/262 of 19 December 2019 laying down the general arrangements for excise duty (OJ L 58, 27.2.2020, p. 4, ELI: <http://data.europa.eu/eli/dir/2020/262/oj>).

## **Article 17**

### **Amendments**

The Council shall have the power to change these Statutes and its annexes by a qualified vote. A two thirds majority of ERIC members that are EU Member States shall be required to amend any of these articles and annexes. The date of any amendments shall be recorded in these Statutes. The Statutes of the SHARE-ERIC shall at all times comply with the Council Regulation 723/2009 on the Community legal framework for a European Research Infrastructure and all other applicable European Laws and Regulations.

## **Article 18**

### **Accession**

After the entry into force of these Statutes, any Government may accede thereto with the consent of two thirds of the Contracting Parties in the Council upon the conditions negotiated. The conditions of accession shall be the subject of an agreement between the Contracting Parties and the acceding Government or group of Governments.

## **Article 19**

### **Duration of the Organisation**

- (1) The Organisation is set up for an indefinite period of time.
- (2) A Contracting Party may withdraw from the SHARE-ERIC by giving written notice to the Chair twenty-four months in advance. The date of withdrawal shall coincide with the end of one SHARE Wave.
- (3) A motion, specifying the procedure and timeframe, if approved by the Council by a two thirds majority, can wind up the Organisation.
- (4) The European Commission shall be notified of any such decision within 10 days of it being made, pursuant with Article 16 of the Council Regulation 723/2009 on the Community legal framework for a European Research Infrastructure Consortium. Without undue delay after the closure of the winding-up procedure, and in any event within 10 days after such closure, the ERIC shall notify the Commission thereof.

## **Article 20**

### **Availability of these Statutes**

These Statutes shall be made publicly available through the SHARE-ERIC website, pursuant with Article 9 of the Council Regulation 723/2009 on the Community legal framework for a European Research Infrastructure.

## Annex 1a:

### Contracting Parties and their Scientific Partner Institutions and Country Team Leaders

Country	Scientific Partner Institution	Short description of the institution	Country Team Leader
Austria	University of Linz, Dept. of Economics	The <b>Department of Economics</b> at the <b>University of Linz</b> directs the Austrian participation in the SHARE project. Its research focus being is labour economics, public economics and problems of pension reform as well environmental economics.	<b>Rudolf Winter-Ebmer</b> , Professor of Economics and specialist in empirical labour economics, leads the Austrian Country Team.
Belgium	University of Antwerp, CSB	<b>CSB</b> '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.	<b>Koen Decancq</b> , Associate Professor, and <b>Tim Goedemé</b> , Research Coordinator, lead the Belgian Country Team (Dutch speaking part).
Belgium	University of Liège, CREPP	<b>CREPP</b> 's main fields of specialisation are social security, retirement behaviour, and well-being among the elderly and intergenerational transfers.	<b>Sergio Perelman</b> , Professor of Economics with expertise in labour economics, leads the Belgian Country Team (French speaking part).
Bulgaria	Institute for the Study of the Societies and Knowledge at the Bulgarian Academy of Sciences (ISSK-BAS), Sofia	The mission of <b>ISSK-BAS</b> is to ensure an adequate knowledge of social processes and to contribute to optimizing policy making in the social-economic field.	<b>Ekaterina Markova</b> , senior researcher, leads the Bulgarian Country Team.
Croatia	University of Zagreb, FEB	Faculty of Economics and Business Zagreb ( <b>FEB</b> ) is the oldest institution of higher education in economics in Croatia as a part of the University of Zagreb.  FEB is committed to research and education of highly qualified experts, who will successfully and responsibly respond to contemporary global business and social challenges.	<b>Šime Smolić</b> , Assistant Professor, leads the Croatian Country Team.
Cyprus	Economics Research Centre ( <i>CypERC</i> ), Department of Economics, University of Cyprus (UCY)	The <b>CypERC</b> within the Department of Economics directs the Cyprus participation in the SHARE project. The CypERC is an independent non-profitable research institution aiming at high quality, policy oriented research in economics. While emphasis is placed on subjects concerning the Cyprus economy, research at CypERC has a broad perspective and aims at results of high academic standards with wide international interest.	<b>Nikolaos Theodoropoulos</b> , Assistant Professor, leads the Cypriot Country Team.
Czech Rep.	CERGE-EI, Prague	<b>CERGE-EI</b> is fully accredited in both the United States and the Czech Republic. Its main expertise is in social, economic and political transition in the Central and Eastern European countries and in the former Soviet Union region.	<b>Radim Bohacek</b> , Senior Economist, leads the Czech Country Team.
France	LEDa-LEGOS, Paris-Dauphine University	The <b>Department of Health Economics and Management (LEDa-LEGOS)</b> 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.	<b>Florence Jusot</b> , Professor of Economics with expertise in health economics, leads the French Country Team.

Germany (coordination)	SHARE Berlin Institute (SBI)	<b>SBI</b> was founded by a consortium of five large institutions – the Berlin Social Science Center (WZB), the German Institute for Economic Research (DIW Berlin) with its Socio-Economic Panel (SOEP), and Charité - Universitätsmedizin Berlin, the largest research hospital in Germany, plus later the German Centre of Gerontology (DZA) – in order to succeed MPG as the host of SHARE Central. SBI is a non-profit company conducting substantive and methodological research at the interface between socio-economic and bio-medical research. One task of SBI is the international coordination of SHARE and the implementation of the survey to maintain the same high methodological standards in all participation countries. SBI is responsible for the coordination of the questionnaire development of SHARE, the preparation and coordination of the fieldwork in all SHARE member countries, and the processing and provision of the research data to the SHARE users in science and research.	<b>David Richter</b> , Professor of Psychology, is the Director SHARE Infrastructure at SBI.
Germany (country team)	Munich Research Institute for the Economics of Aging and SHARE Analyses (MEA)	<b>MEA</b> is a world-renowned centre of excellence for the economics of ageing. It moved 2011 from Mannheim to Munich after an offer to become part of the Max Planck Society. Since 2023, it is an independent institute, funded by Max Planck, the EU-Commission, the US National Institute on Aging, and the German Research Foundation (DFG). Research areas are savings, social insurance and public policy; macroeconomic implications of population ageing; and public health. MEA has been the coordination centre of SHARE since its first wave. MEA hosts SHARE-ERIC and SHARE Germany	MEA is represented by <b>Axel Börsch-Supan</b> , its Director and Professor of Economics, who has coordinated the SHARE family of projects. <b>Arne Bethmann</b> leads the German Country Team.
Greece	Panteion University, Athens	<b>Panteion University</b> 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.	<b>Antigone Lyberaki</b> , Professor of Economics, leads the Greek Country Team.
Hungary	Institute of Economics, Centre for Economic and Regional Studies of the Hungarian Academy of Sciences	The <b>Institute of Economics</b> is committed to international standards of fundamental and applied research in economics. It has focused increasingly on the analysis of the contemporary market economy and the transformation of the Hungarian economy.	<b>Anikó Bíró</b> , Research Fellow, leads the Hungarian Country Team.
Israel	The Hebrew University, IGDC	The Israel Gerontological Data Center at the <b>Hebrew University</b> in Jerusalem facilitates research and dissemination of data on aging, and directs the Israeli participation in the SHARE project.	<b>Sharon Shiovitz-Ezra</b> , Senior Lecturer of Hebrew University of Jerusalem, leads the Israeli Country Team.
Italy	University of Padua, Dept. of Economics	Padua's <b>Department for Economics and Management</b> covers the whole spectrum of economics and management science, in particular applied econometrics, public and health economics as well as labour economics.	<b>Guglielmo Weber</b> leads the Italian Country Team. He is Professor of Econometrics and also serves as deputy coordinator of SHARE.
The Netherlands	University of Tilburg, Netspar	<b>Netspar</b> is a scientific Network for studies on Pensions, Aging and Retirement connected to the <b>Faculty of Economics and Business Administration of Tilburg University</b> .	<b>Adriaan Kalwij</b> , Associate Professor, leads the Dutch Country Team.

Poland	Warsaw School of Economics	The <b>Warsaw School of Economics</b> conducts research in various areas of economics, finance, management and business administration as well as in public policy and political science. Our researchers lead the rankings of internationally recognized academics from Poland. Researchers are among experts of the European Commission in the fields of research & innovation as well as social policies.	<b>Agnieszka Chłoń-Domińczak</b> leads the Polish Country Team. She is Assistant Professor and has served as Deputy Minister of Labour and Social Policy and vice president of the Social Protection Committee of the European Council, cooperating with the World Bank, ILO and the OECD.
Slovenia	Institute for Economic Research Ljubiana (IER)	The <b>Institute for Economic Research (IER)</b> is the leading institute for macroeconomic research in Slovenia, which recently focuses particularly on economic, social and health aspects of structural reforms in Slovenia.	<b>Boris Majcen</b> , Director of the IER, leads the Slovenian Country Team.
Sweden	Centre for Demographic and Ageing Research (CEDAR), Umeå University.	<b>CPS</b> directs the Swedish participation in SHARE together with the department of Sociology at Umeå University. CPS is a multidisciplinary centre and includes researchers from social sciences, economics, humanities, medicine and behavioural sciences. The research focuses on population dynamics in relation to ageing including studies on social networks, retirement, life style and health. The centre hosts several large micro-databases.	<b>Gunnar Malmberg</b> , Professor of Human Geography, leads the Swedish Country Team.

## Annex 1b:

### Observers and their Scientific Partner Institutions and Country Team Leaders

Country	Scientific Partner Institution	Short description of the institution	Country Team Leader
Switzerland	University of Lausanne Faculty of Business and Economics	The <b>University of Lausanne</b> is a higher teaching and research institution composed of seven faculties. Its research activities focus on three main themes: human and social sciences, life sciences and medicine, and environmental sciences.	Prof. <b>Jürgen Maurer</b> , Ph.D is professor of health economics and management at the Faculty of Business and Economics (HEC) of the University of Lausanne in Switzerland. His main research interests lie in the fields of health, population and development economics, with a special focus on aging and human development in both developing and developed countries. Together with Prof. Alberto Holly, he leads the Swiss Country Team.

## **Annex 2:**

### **List of Management Board members**

<b>Axel Börsch-Supan</b> , Professor of Economics, (currently inactive) Managing Director
<b>Guglielmo Weber</b> , Professor of Econometrics, Deputy Managing Director and Area Coordinator Income and Assets
<b>Karen Andersen-Ranberg</b> , Professor of Epidemiology, Biostatistics and Biodemography, Area Coordinator Health
<b>Martina Brandt</b> , Professor of Sociology, Area Coordinator Social and Family Networks.
<b>Agar Brugaivini</b> , Professor of Econometrics, Area Coordinator Work and Retirement.
<b>Agnieszka Chłoń-Domińczak</b> , Assistant Professor of Economics, Responsible for European Relations, Deputy Managing Director and Acting Managing Director
<b>Florence Jusot</b> , Professor of Economics, Area Coordinator Healthcare.
<b>Anne Laferrere</b> , Professor of Econometrics, Responsible for Survey Methodology
<b>Pedro Mira</b> , Professor of Economics, Responsible for Administration and Finances
<b>David Richter</b> , Professor of Psychology, Director SHARE Infrastructure
<b>Šime Smolić</b> , Assistant Professor, Chairperson of the Assembly of Country Team Leaders.

## **Annex 3: Income and Expenditures in the Annual Spending Plan**

The Annual Spending Plan shall enlist all income already received or expected to be received by SHARE-ERIC, and all expenditures already committed or expected to be made by SHARE-ERIC in the respective calendar year.

The Annual Spending Plan shall have three sections. In each section, it shall compare income and expenditures (“profit and loss statement”).

	<b>Income</b>	<b>Expenditure</b>
<b>Section 1: Fees</b>	Income received from membership fees of SHARE-ERIC members and participation fees from non-ERIC members participating in SHARE, itemized by country	Expenditures financed from fee income, separately for ERIC administration and other common costs as defined in Article 11 (4), itemized by purpose
<b>Section 2: Grants</b>	Income from EU- Commission and other grants received by SHARE ERIC according to Article 11 (5), excluding survey contributions, itemized by grant	Expenditures financed from grants, itemized by recipient and purpose
<b>Section 3: Survey contributions</b>	Survey contributions received by SHARE-ERIC from SHARE member countries, the EU- Commission and other granting institutions	Expenditures financed by survey contributions to SHARE-ERIC, itemized by SHARE member country



## **Annex 4:**

# **Scientific Monitoring Board**

### **Article 1 Establishment**

The Management Board will constitute an advisory board of at least six eminent, independent and experienced scientists (hereinafter referred to as “the Scientific Monitoring Board”) to provide an external advising role for the benefit of the Survey so as to check the quality of the work of the research consortium and to provide periodic advice to the Council and Assembly of Country Team Leaders.

### **Article 2 Independence**

The Scientific Monitoring Board shall be independent from the SHARE-ERIC.

### **Article 3 Tasks**

- (1) The main task of the Scientific Monitoring Board is to monitor the scientific quality of SHARE. It should give feedback to the Management Board and the Assembly of Country Team Leaders at least once per year.
- (2) Every two years, the Scientific Monitoring Board shall issue a written report to the Council of the SHARE-ERIC. This report shall also assess the services offered to the users of the SHARE data.
- (3) Initially and after about three years, the Scientific Monitoring Board shall set up a thorough review of the scientific strategy of SHARE, thereby exploring innovative fields and modes of data collection.

### **Article 4 Members**

- (1) The members of the Scientific Monitoring Board select new members as they feel appropriate to sufficiently represent all scientific areas covered by SHARE.
- (2) At least one member shall be an investigator of the English Longitudinal Study of Ageing to ensure close co-operation with this survey and to give additional advice and guidance from their experience.
- (3) At least one member shall be a investigator of the U.S. Health and Retirement Study to ensure close co-operation with this survey and to give additional advice and guidance from their experience.
- (4) The current chairperson of the Scientific Monitoring Board is Arie Kapteyn, Professor of Economics, University of Southern California, USA, Dutch.
- (5) The other current members and the fields they are representing are

Lisa Berkman, Social epidemiology and biomarkers, Harvard University, USA  
David Bell, Labour economics and the economics of social care, University of Stirling, UK  
Kaare Christensen, Epidemiology, biostatistics and biodemography, Southern Denmark  
University, DK  
Mick Couper, Survey methods, data dissemination methods, and new technology,  
University of Michigan, USA  
Michael Hurd, Savings and health, data access and quality; harmonization with HRS,

RAND Corporation, USA  
Daniel McFadden, Survey methodology, University of Berkeley, USA  
David Melzer, Cost and quality of hospital care, University of Chicago, USA  
Pierre Pestieau, Retirement and labour markets, University of Liege, BE  
Norbert Schwarz, Survey psychology and data access methodology, University of Southern California, USA, German  
Andrew Steptoe, Biomarkers, harmonization with ELSA), University College London, UK  
Arthur Stone, Subjective well being, University of Southern California, USA  
Robert Willis, Cognition in economics, University of Michigan, USA

**Article 5**  
**Budget**

- (1) The chairperson of the Scientific Monitoring Board receives a budget according to Article 8 (2) of the Statutes of the SHARE-ERIC for travel expenses and honoraria of Board's members. The Chairperson of the Scientific Monitoring Board has full discretion how to spend the budget.
- (2) The current annual budget is € 30,000. The technical administration of the budget obliges to the staff of the Management Board.

## **Annex 5:**

### **Restricted Procurement Procedure**

The following restricted procurement procedure shall be applied to all survey research and survey development services where the benefits accrue to the entire scientific community and which are wholly remunerated by the SHARE-ERIC.

Survey research and survey development services include those research and development services that are necessary to maintain and advance the state of the art in survey technology. They include, but are not confined to, the development of survey software, research on survey methodology, and the development of innovative interview techniques and their application in the field.

The description of the services to be procured shall be made publicly available in a contract notice before the beginning of the procurement process. The contracting parties shall indicate in such notice the objective and non-discriminatory criteria or rules they intend to apply, the minimum number of candidates they intend to invite and, where appropriate, the maximum number.

Competition can be limited to three potential providers. If there are three or less providers in the market for the services to be contracted, all providers in the market shall be included in the competition.

The selection among bidders shall be based on the lowest offer price and the highest service quality. Service quality shall be defined by the above-mentioned description of the services to be procured.