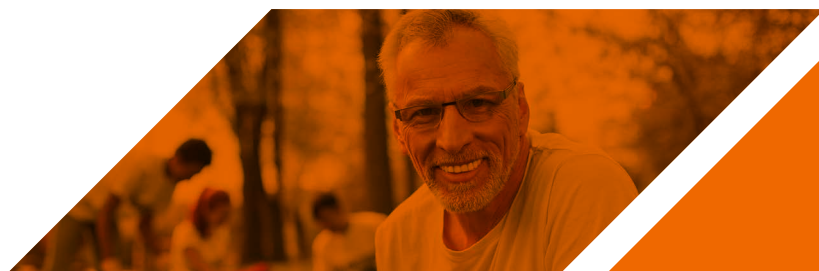


ANNUAL ACTIVITY REPORT

2022/23



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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 today, 616,000 in-depth interviews with 159,000 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?

The need to face health risks even in modern times was highlighted by the COVID-19 pandemic. Global crises are reaching out to Europe. The effects of demographic change are becoming noticeable in Europe's ageing societies. Therefore, longitudinal data that allow for cross-country comparisons and research with a lifecycle perspective are needed to investigate how people cope with a changing world – who wins and who loses. SHARE will therefore 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 sur-



veys. 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 11<sup>th</sup> SHARE-ERIC Annual Activity Report, which provides detailed insights into the scientific achievements, operational activities and financial aspects of SHARE-ERIC in 2022.

The past year has marked a new era for SHARE: With the establishment of the SHARE BERLIN Institute, the move of SHARE Central from Munich to Berlin and the setup of a new management of SHARE, the foundation for SHARE's future has been laid. Building on this foundation, another major step has been taken: At the 15<sup>th</sup> SHARE-ERIC Council in November, the SHARE-ERIC delegates adopted a revision of the SHARE-ERIC Statutes, enabling us to extend SHARE beyond 2024 and to work together to ensure its long-term sustainability. The new Statutes reflect SHARE's resilience and commitment to excellence in research.

As we navigate these challenging times, our consortium remains dedicated to fostering collaboration and driving scientific progress for the benefit of all. I am confident that our collective efforts will enable SHARE to continue making meaningful contributions to society and addressing the complex challenges facing Europe and the world. The new SHARE BERLIN Institute, which became operational in January 2023, will strengthen the European and German research infrastructure landscape and offers a sound basis to further enhance the transfer of SHARE research into the political sphere.

I would like to take this opportunity to thank not only all SHARE-ERIC member states and participating countries for their continued support as well as the founding partners of the SHARE BERLIN Institute – namely the WZB Berlin Social Science Center, the German Institute for Economic Research (DIW), the Charité – Universitätsmedizin Berlin and the German Centre of Gerontology – Deutsches Zentrum für Altersfragen (DZA) – for their efforts towards the long-term future of the SHARE infrastructure.




Dr. Sandro Holzheimer  
SHARE-ERIC Chair

## FOREWORD FROM THE MANAGING DIRECTOR

2022 has been a difficult year for SHARE. At the end of 2021, we were optimistic that the COVID-19 pandemic will end and that we could start Wave 9 with minimal delay in the usual fashion. In fact, COVID-19 became endemic and still is affecting people in Europe and globally. Consequently, it was much harder to recruit interviewers, and respondents were reluctant to be interviewed face-to-face. SHARE has adapted by stretching the survey schedule and is pushing ahead with "SHARE 2.0" that will contain more flexible survey methods. We will use all available communication modes rather than relying solely on face-to-face interviewing, and we will split the interview in a core with questions that are essential for SHARE as a stable pan-European long-term panel study and in-between modules that focus on pressing issues.

The other big challenge for SHARE in 2022 was to set up a new organizational structure. This culminated in the opening of the new SHARE BERLIN Institute on January 1, 2023, with David Richter as Director SHARE Infrastructure and Sylvia Becker as Managing Director. The SHARE BERLIN Institute replaces the Max Planck Society as a host for SHARE Central, the machine room that internationally coordinates and executes the scientific and operational activities of SHARE. SHARE-ERIC, which oversees the strategic, financial and legal development of SHARE will remain in Munich for the time being, hosted by the Munich Research Institute for the Economics of Aging and SHARE Analyses. This organizational change implied a new employer for the SHARE staff, a new IT set-up, and a lot of change management. Let me express my gratitude to the staff and the new leadership at the SHARE BERLIN Institute for their endurance.

The COVID-19 pandemic and the war in the Ukraine have put governments under financial strain. In combination with the high inflation, budgets for science are under pressure. Expenditures are increasing but grant budgets do not grow in proportion. This is the third major challenge for SHARE in 2022 and has forced us to slow down. We are grateful to the Commission and the national governments, which fund the bulk of SHARE's work in spite of these difficulties. We are fortunate to have a Council with understanding and helping delegates, and project officers at DG RTD and DG EMPL who are guiding us. Specifically, I would like to thank the BMBF and the Council Chair, Sandro Holzheimer, who have strongly supported the foundation of the SHARE BERLIN Institute, and Elsa Fornero, the outgoing Council's vice chair, who has accompanied SHARE through difficult transition times.

Let me finally thank the 28 country teams. They are the foundation of SHARE. It was good to see them all in Helsinki in person after too many meetings that were only virtual, and to realize that SHARE is a genuinely European project, which does not only produce scientific results but also makes a small contribution to European cohesion.




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

# WHAT IS SHARE?

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

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. In order 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 159,000 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-intend-

ed 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). Since then, SHARE-ERIC, led by its Managing Director Professor Dr. h.c. Axel Börsch-Supan, Ph.D., at the Munich Research Institute for the Economics of Aging and SHARE Analyses, is the legal and financial "shell" for all SHARE operations, with the country teams, coordination teams, and – most importantly – the central coordination team as associated partners. 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 nature is reflected in the coordination of the questionnaire's various research fields. Professor Guglielmo Weber, Ph.D., (University of Padua, Italy) is the coordinator for the Income & Wealth section, Karen Andersen-Ranberg, Ph.D., (University of Southern Denmark) for Health, Professor Florence Jusot (Université Paris-Dauphine, France) for Health Care, Professor Agar Brugiavini, Ph.D., (Ca' Foscari University of Venice, Italy) for Work & Retirement and Professor 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.

# THE SHARE BERLIN INSTITUTE

The SHARE BERLIN Institute GmbH was successfully founded and established last year. The following pages will provide an overview of the developments until spring 2023, give insights into the concept underlying the founding of the institute, explain the structure in which the new institute is embedded and outline the main objectives of the SHARE BERLIN Institute (SBI). In addition, the new management will be introduced.

# ESTABLISHING A NEW INSTITUTE – THE START IN BERLIN

## Goals and vision

The main objective of establishing the SHARE BERLIN Institute (SBI) was to continue SHARE in a reliable, multidisciplinary and legally secure framework and to work on its further scientific development after the dissolution of the Munich Center for the Economics of Aging (MEA) in Munich at the end of 2022. In Berlin, SHARE now finds a new and permanent home in the SHARE BERLIN Institute and a new institutional framework, which also creates the prerequisite and stability for SHARE to continue as a European research infrastructure beyond the current time limit of 2024.

At the same time the founding of the SHARE BERLIN Institute has been linked to its own long-term scientific agenda. Thus, the SBI will be able to enrich the research landscape in the long term and will thereby further contribute to the advancement of interdisciplinary and international data-based research in Europe.

Although this is a new foundation in the sense of corporate law, the takeover of the previous staff and thus also of a large part of the previous tasks of SHARE Central was a central key for the project in order to achieve the desired continuation of SHARE. In this way, it was possible to transfer the existing knowledge about SHARE to the new institute. As of March 2023, it can be reported that 45 people including management and student assistants have been employed at the SHARE BERLIN Institute since January 1st 2023. Furthermore, the physical move of SHARE Central from Munich to

Berlin also took place at the end of last year. The SHARE BERLIN Institute GmbH now has a centrally located office in Berlin. In the course of the move, a new IT and administrative infrastructure was set up, which meets all the requirements of a large-scale project like SHARE and enables the staff to work flexibly, taking all requirements into account.

With regard to SHARE, long-term planning security is of central importance. It is in the nature of the study design that for a large-scale panel study such as SHARE, which focuses on the collection of socio-economic and biomedical life course data, long-term continuation is of considerable (research) interest throughout Europe. In particular, since SHARE has been collecting life course data since 2004, the value for research increases with each additional survey wave and newly acquired data. At the same time, SHARE is highly productive as a research infrastructure and contributes to evidence-based policy advice with harmonised Europe-wide basic research. Due to the expiring cooperation agreements between SHARE-ERIC, the Max Planck Society (MPG) and the Technical University of Munich (TUM), the implementation of Wave 9 and Wave 10 would have been at risk without the establishment of the SHARE BERLIN Institute. Certainty in this regard is now guaranteed. The SHARE BERLIN Institute now offers the appropriate institutional framework to make the continuation of the project possible and to be able to continue and expand the successes that have already been achieved.





# DESIGN AND STRUCTURE OF THE NEW INSTITUTE

## Developing a new organisational structure

### Shareholders and Partners

Berlin is a centre for high-level research institutes. Therefore, it was possible to embed the SHARE BERLIN Institute in a collaboration with four leading research institutions. For this purpose, corresponding partnership agreements were concluded with the founding partners. The founding partners are the WZB Berlin Social Science Center, the German Institute for Economic Research (DIW Berlin), the University hospital Charité and the German Centre of Gerontology (DZA). There is also close cooperation with the Robert Koch Institute (RKI). However, there is a special feature concerning the German Centre for Gerontology (DZA): Although the DZA is a founding partner, it will not claim its corporate rights until autumn 2023 due to restructuring processes.

Of particular importance in this context is the fact that a broad spectrum of scientific research ques-

tions can be covered through this cooperation. In terms of content, the cooperation will focus on the topics of retirement of the baby boomers, the silver economy and digitalisation, health prevention and preservation in an ageing world, flexible care for the elderly and the increasing inequality in income, wealth and health.

Furthermore, this research cooperation aims to generate relevant progress regarding survey methodology. Methodological innovations in the following areas are targeted: Multi-mode surveys, more flexible frequency of surveys, objective data and the linking of the data with regional, administrative and other process data. This new network also offers the opportunity to involve scientists of the above-mentioned founding partners in the process of SHARE questionnaire design in a consultative way.



## Committees

The shareholders' meeting, the board of trustees, the management and the scientific advisory board form the committees of the newly founded non-profit SHARE BERLIN Institute GmbH. This composition corresponds to a typical structure that can also be found at other non-university research institutions.

Nevertheless, an essential feature is that the SHARE BERLIN Institute, as the scientific partner institution of SHARE-ERIC, acts as a liaison between the German national level and the European level. The current institutional set-up ensures that the different governance structures could be intertwined in a legally compliant manner and that no scientific or organisational divergences can arise between SHARE-ERIC, SHARE Central and SHARE Germany.

## The SBI Management

**Prof. Dr. David Richter** is the new **Director SHARE Infrastructure** at the SHARE BERLIN Institute GmbH. He is also a Professor of Survey Research at the Free University Berlin.

Professional career: Before David Richter joined the SBI, he worked as acting division head of survey methodology and management of the Socio-Economic Panel study (SOEP) at the German Institute for Economic Research (DIW Berlin), and as a survey manager and researcher at the SOEP, the University of Bamberg, the University of Leip-

zig and the Jacobs University Bremen. David Richter studied psychology at Free University Berlin and received a PhD in psychology at Jacobs University Bremen.

Research interests: David Richter is interested in the development of emotions, well-being, and life satisfaction across the adult lifespan and the influence of life-events on the development of life satisfaction and well-being. Depending on the research question, he uses psychological methods in his studies (like latent growth modelling) as well as methods from the field of economics (like fixed-effects regressions).



“For me, the focus of all considerations is that we continue to ensure the quality of SHARE with the newly founded SHARE BERLIN

Institute, conduct Europe-wide research at the highest level and thereby remain relevant as a study. We achieve this by adding innovative methods and topics. I also see great potential through synergy effects between the collaboration partners. This will strengthen Berlin as a hub for international, data-based research”, says Director SHARE Infrastructure, Prof. Dr. David Richter.

**Sylvia Becker** is the new **Commercial Managing Director** at the SHARE BERLIN Institute GmbH. A particular focus of her work is on the active transformation, establishment and further development of the administrative structures of the institute.

Professional career: Sylvia Becker has versatile commercial performance experience in the health, non-profit and service sectors. Before joining the SBI, Sylvia Becker worked as Managing Director of the ECARF Institute GmbH. She also worked as COO for ECARF (European Centre for Allergy Research Foundation). As part of her work at ECARF, Sylvia Becker was also scientifically active and published on the topic of allergy research. In particular, she also worked on the development of

study designs. Prior to this, she was, among other things, commercial manager at WWF Germany for many years.



“My passion is to develop organisations strategically and in terms of personnel. This leads to my goal of managing SHARE BERLIN Institute

GmbH as sustainably and efficiently as possible so that research is secured in the long term”, says Commercial Managing Director, Sylvia Becker.

# 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

- **Results from the SHARE-COVID19 Project:** The SHARE-COVID19 project, launched in November 2020, has rendered a considerable amount of research on the consequences of the pandemic and subsequent control measures on the lives of respondents aged 50+ in Europe and Israel. This chapter provides an overview of the most striking findings in the project's thematic areas: Healthcare, health and health behaviour, labour market implications and inequality, social networks, as well as housing and living arrangements. (pp. 24–25)
- **Collecting SHARE Data in Wave 9:** Wave 9 fieldwork ended mid-September 2022. By taking a country-by-country approach in Wave 9, which gave country teams the flexibility to respond to local conditions, face-to-face fieldwork could be implemented again after having to switch to telephone interviews during Wave 8 due to the pandemic. Although the pandemic situation made it particularly difficult to work on refreshment samples, the overall fieldwork performance is satisfactory with over 72,000 interviews collected in 28 countries. (pp. 26–28)
- **Wave 10 Questionnaire:** In Wave 10, the SHARE questionnaire will be extended by two additional modules: IT questions and willingness to participate in an online survey. The first aims to assess the digital divide among Europe's older population and to identify barriers to digital participation. The second is part of SHARE's preparation for future multi-mode data collection. There has also been a revision of the End-of-Life interview and the COVID-19-related questions of Wave 9, as well as a software change. (p. 29)
- **Data Quality Assessment in SHARE:** SHARE has continued to promote the achievement of the same standards in all participating countries by establishing a common legal, scientific and data quality framework to which all survey agencies must adhere. SHARE publicly documents compliance profiles and retention rates. In addition, a technical report, updated with each data release, provides information on participation patterns and the longitudinal development of the survey. (pp. 30–31)
- **Record Linkage in SHARE:** SHARE has developed record linkage projects in several countries to complement survey data with objective administrative data. Linked datasets broaden research possibilities as they exploit the advantages of both data sources. By 2023, there are ongoing linkage projects in eight SHARE countries: Austria, Belgium, Denmark, Estonia, Finland, Germany, Italy and the Netherlands. (pp. 32–33)
- **Health Measures in SHARE:** Objective health measures have been an important part of SHARE since its beginning. **Accelerometer data** allows to measure physical activity of SHARE respondents. The data were released in 2021, with a major update in 2022. Also in 2022, SHARE joined ProPASS, the Prospective Physical Activity, Sitting and Sleep consortium, which will allow researchers to combine SHARE accelerometry data with data from other studies from all around the world which also conducted accelerometer measurements. (pp. 34–35)
- **The Harmonized Cognitive Assessment Protocol (HCAP),** which measures bio-medical and socio-economic precursors of cognitive decline in five SHARE countries, has been brought forward with two pre-tests in 2021 and a main data collection between May and October 2022. SHARE-HCAP has been in close contact with the other HCAP studies to be as harmonized as possible and to benefit from their insights. (p. 36)
- Further, the **SHARE Biomarker Project** completed laboratory analyses of all SHARE Wave 6 DBS samples, performed validation experiments and corrected the analysis values for various variables. These markers will provide information on diabetes, anaemia and frailty, kidney degeneration, and the risk of cardiovascular disease. Documentation of the entire process and initial publications are in preparation. Once the validity checks have been completed, the biomarker data will be released. (p. 37)
- **SPLASH:** The **Social PoLicy Archive for SHARE** aims to foster comparative policy-oriented research using SHARE microdata. It provides easy access to macro-indicators and policy information as well as socio-economic contextual data for longitudinal, multilevel research. In 2022, this included the integration of data collection on transnational differences related to the COVID-19 pandemic, the collection of macro indicators for the analysis of the regular SHARE Waves, and a revision and update of data on job retention measures implemented to combat unemployment/loss of income during the pandemic. (pp. 38–39)
- **SHARE Users & Publications:** By the end of 2022, SHARE had more than 16,100 registered users from all over the world. With more than 2,200 new registrations in 2022, both the total number of registered SHARE users and the annual number of new registrations have reached an all-time high. This is reflected in the number of publications based on SHARE data, which has risen to 3,740 by the end of 2022. (pp. 40–42; pp. 46–59)
- **User Support Activities:** SHARE supports its users by providing workshops, training sessions, seminars and summer schools. In 2022, a variety of online and in-person events took place in several European countries. In addition, SHARE Central maintains a detailed and understandable description of SHARE data and metadata as a basis for excellent user support, and maintains a support email account to offer fast and well-founded answers to user questions. (p. 43)
- **SHARE User Conference:** After a pandemic-related break, a SHARE user conference could take place again in Bled, Slovenia, in 2022. Organised by the Institute for Economic Research in Ljubljana in cooperation with SHARE-ERIC, scientists from all over the world gathered to discuss SHARE-related research on the topic of "Ageing Societies in Times of Health, Social and Economic Crises". (pp. 44–45)

# RESULTS FROM THE SHARE-COVID19 PROJECT

## The life situation of the 50+ population during the pandemic

Since its launch in November 2020 under the European Commission's H2020 programme, the SHARE-COVID19 project (grant number 101015924) has yielded a considerable amount of research findings and publications on the consequences of the pandemic and subsequent control measures on the life situations of respondents aged 50+ in Europe and Israel. The findings are based on data collected prior to the outbreak of the pandemic and the two SHARE Corona Surveys. The first SHARE Corona Survey (SCS1) was fielded in summer 2020. It focused on the most immediate reactions to the pandemic, such as adherence to preventive measures, or respondents' personal and social exposure to the coronavirus. The SCS1 also aimed to measure the changes in income, employment status, and respondents' social and family life. The second SCS was fielded one year later, in summer 2021. As novelties, SCS2 asked timely questions on vaccine uptake and willingness, international travel, use of public transportation, and gathered information on the extent respondents caught up on previously cancelled medical treatment and appointments. In the following paragraphs, we present some of the most outstanding recent results of the SHARE-COVID19 project.

The pandemic exacerbated issues regarding access to **healthcare** for older people who avoided seeking medical treatment for fear of infection or had their medical treatments postponed or denied. In response, remote medical services were recognized as an essential adjustment mechanism to maintain the continuity of healthcare provision. Results from the SHARE-COVID19 project show that remote medical care could play an important role in maintaining healthcare access for older adults and increasing health systems' preparedness in future health emergencies. In addition, findings reveal that based on characteristics available to health insurance providers, machine learning algorithms can be used to efficiently target efforts to reduce missed essential care.

Since its launch in November 2020 under the European Commission's H2020 programme, the SHARE-COVID19 project (grant number 101015924) has yielded a considerable amount of research findings and publications on the consequences of the pandemic and subsequent control measures on the life situations of respondents aged 50+ in Europe and Israel. The findings are based on data collected prior to the outbreak of the pandemic and the two SHARE Corona Surveys. The first SHARE Corona Survey (SCS1) was fielded in summer 2020. It focused on the most immediate reactions to the pandemic, such as adherence to preventive measures, or respondents' personal and social exposure to the coronavirus. The SCS1 also aimed to measure the changes in income, employment status, and respondents' social and family life. The second SCS was fielded one year later, in summer 2021. As novelties, SCS2 asked timely questions on vaccine uptake and willingness, international travel, use of public transportation, and gathered information on the extent respondents caught up on previously cancelled medical treatment and appointments. In the following paragraphs, we present some of the most outstanding recent results of the SHARE-COVID19 project.

### Recommended reading:

Smolić Š, Blaževski N, Fabijančić M (2022). Remote healthcare during the COVID-19 pandemic: Findings for older adults in 27 European countries and Israel. *Frontiers in Public Health*. <https://doi.org/10.3389/fpubh.2022.921379>

Reuter A, Smolić Š, Bärnighausen T, Sudharsanan N (2022). Predicting missed health care visits during the COVID-19 pandemic using machine learning methods: Evidence from 55,500 individuals from 28 European Countries. *medRxiv preprint*. <https://doi.org/10.1101/2022.03.01.22271611>

A study in the research field on **health and health behaviour** examines the risk factors of post-COVID-19 conditions among Europeans aged 50 years and above who tested positive for COVID-19. The authors find that respondents above the age of 70 years and with medium or lower educational levels have a higher risk of post-COVID-19 conditions. In addition, when considering the severity of the COVID-19 disease, those who were hospitalised due to COVID-19 had a 26 times higher risk of post-COVID-19 conditions compared with those who were only tested positive.

### Recommended reading:

Bovil T, Wester CT, Scheel-Hincke LL, Andersen-Ranberg K. (2022). Risk factors of post-COVID-19 condition attributed to COVID-19 disease in people aged 50+ in Europe and Israel. *Public Health*. <https://doi.org/10.1016/j.puhe.2022.09.017>

Researchers from the economic area concentrate on **labour market implications** and **inequality**. Focusing on the initial phase, one study in this field analyses the role of retirement on the adoption of preventive behaviours and other factors. Their findings show that European retirees limited their mobility and adopted preventive behaviours. Generally speaking, age has a strong, positive effect on such behaviours. Another research team explores the concept of resilience. They attempt to apply the concept to individual behaviour, focusing on how living through a major crisis affects the likelihood of coping with a subsequent shock, for instance, whether the financial crisis in 2008 is connected with greater resilience among older individuals during the pandemic. Their preliminary findings suggest different outcomes due to individual factors such as labour market participation, social networks, sex, or marital status.

### Recommended reading:

Bertoni M, Celidoni M, Dal Bianco C, Weber G (2021). How did European retirees respond to the COVID-19 pandemic? *Economic Letters*, vol 203. <https://doi.org/10.1016/j.econlet.2021.109853>

Lyberaki A, Tinios P, Georgiadis T (2022). Living through two crises: A preliminary investigation of resilience among older Europeans. *Social Cohesion and Development*, 17(2), 99–116.

The pandemic and the national containment measures also affected our **social networks**. A study on the life situation of respondents aged 65 years and above found that social distancing was associated with a higher probability of sleeping problems, partially mediated by depression and moderated by employment status and perceived economic status. The authors conclude that policymakers should determine future policies and regulations that encourage employment among older adults and improve their economic resilience.

### Recommended reading:

Khalaila R, Shiovitz-Ezra S (2022). Social distancing and trouble sleeping during COVID-19 pandemic among older adults in Europe: Mediating and moderating effects. *Journal of Nursing Scholarship*, 55(1): 131–140. <https://doi.org/10.1111/jnu.12830>

What is the role of **housing and living arrangements** for the impact of the pandemic on peoples' life situation? One paper of this research group puts the focus on nursing homes. The authors explore whether living in nursing homes led to excess mortality even before the pandemic. Controlling for important characteristics of the elderly population in and outside nursing homes, the researchers assume that the difference in mortality between those two samples can be attributed to the way nursing homes are designed and organized.

### Recommended reading:

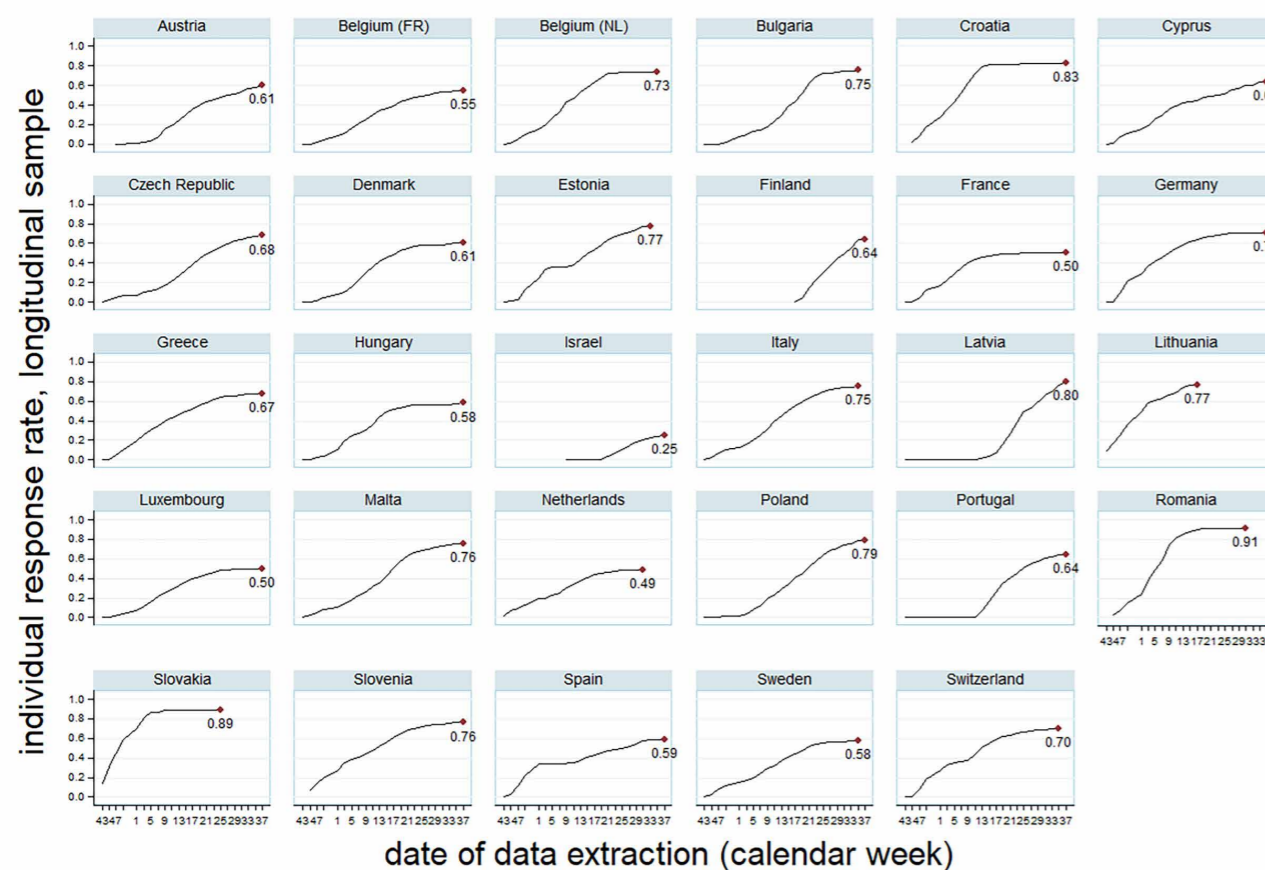
Flawinne X, Lefebvre M, Perelman S, Pestieau P, Schoenmaeckers J (2022). Nursing homes and mortality in Europe: Uncertain causality. *Health Economics*, 32(1): 134–154. <https://doi.org/10.1002/hec.4613>



pandemic, the contact rates are fairly low compared to earlier waves and in general show the difficulties that interviewers encountered while contacting new households during an ongoing pandemic. Consequently, the household and individual response rates for refreshment samples are lower compared to earlier waves as well. With the exceptions of Belgium (FR), Estonia, Croatia, Hungary, Latvia, Poland, Portugal and Slovenia, all countries are below the 30 percent mark. Regarding the panel samples, only Romania and Slovakia were able to reach our target response rate of 85

percent (91 percent and 89 percent, respectively). Croatia came very close to the target response rate with 83 percent. Since fieldwork for the refreshment samples stopped in Wave 8 and continued in Wave 9, results for both waves have to be seen together when evaluating the outcomes for the refreshment samples.

The final response and retention rates will be released once the first public release of the data has been made available to the scientific community.



Graphs by country

Figure 3: Individual retention rates in the overall sample by country over time

# WAVE 10 QUESTIONNAIRE

## New modules about internet use and attitude towards online surveys

In Wave 10, the content of the SHARE questionnaire mostly remained the same as in Wave 9 but was extended with two additional modules – 1) IT questions and 2) willingness to participate in an online survey.

The new IT module aims at evaluating the digital divide among the older population in Europe and at identifying barriers to digital participation. The content was developed in collaboration with the Area Coordinator of the area “Computer skills and IT use” and external topic experts in this field. It includes a set of questions asking about accessibility to and use of different internet-enabled devices, the frequency of the internet use, online activities of respondents, experience with the use of the internet, assistance with online activities, proxy use of the internet on respondent’s behalf and reasons for not using the internet. This module is currently undergoing a qualitative pretest in Germany. Based on the outcomes of the pretest, the wording will be revised for the quantitative pretest.

As part of SHARE’s preparation for future multi-mode data collection, an additional module at the end of the main questionnaire was added to estimate the suitability of the web mode as a complementary mode of data collection for SHARE. A short set of questions asks SHARE internet-using respondents about their previous experience with online surveys and their hypothetical willingness to

participate in a shorter online survey for SHARE in future as well as for the reasons for not participating and concerns related to online surveys.

Another novelty of SHARE Wave 10 is the revision of the End-of-Life interview. The terminology use of hospice and palliative care was harmonised in collaboration with the Area Coordinator across the questionnaire. In addition, there was a revision of the content of the questionnaire for COVID19-related questions that were added in SHARE Wave 9. The content was updated to reflect the current pandemic development. Some of the follow-up questions from Wave 9 were cut and some additional questions (e.g. vaccination against COVID-19) from the SHARE Corona Survey that was fielded on the telephone in Wave 8 and Wave 9 were added to the End-of-Life interviewer of Wave 10.

The End-of-Life questionnaire was programmed for the first time in Quest (previously in Blaise). Quest is a more flexible software than Blaise and it enables a faster development phase for SHARE. While writing the text of the questions in Quest was rather straightforward, implementing unfolding bracket procedures and loops of questions required the development of new programming syntax. The programmed questionnaire is currently being tested. The aim of programming the End-of-Life questionnaire with Quest is to start developing the technical infrastructure for the multi-mode future of SHARE.

# DATA QUALITY ASSESSMENT IN SHARE

## Indicators to measure data quality in a cross-national survey

### The SHARE Compliance Profiles

In order to maximise cross-national comparability, SHARE applies an ex-ante harmonisation approach which goes beyond standardised questionnaire design. This includes the centrally programmed survey instrument, harmonisation of fieldwork procedures via centralised training sessions as well as centralised electronic instruments for contact data collection (CASE CTRL) and fieldwork management (SAMPLE CTRL). This approach has been chosen by SHARE for scientific reasons as it minimises artifacts in cross-national comparisons that are created by country-specific survey design. SHARE is currently conducted in 28 countries. While national operations in all participating countries are coordinated by university-based groups of researchers, the actual interviewing is – in most countries – subcontracted to commercial survey organisations. The latter have the expertise, staff capacities and logistics available to conduct such a large-scale complex panel study as SHARE. It is a major challenge to ensure proper implementation of ex-ante harmonisation within such a decentralised environment. To this effect, SHARE employs three instruments: 1) the SHARE Model Contract which provides the legal framework for standards and quality control; 2) the SHARE Survey Specifications (“Appendix 1” of the Model Contract) which define the quality standards of the survey; and 3) the SHARE Compliance Profiles, which report assessing adherence to those standards ex-post. The first two instruments build the legal and scientific framework to be adopted by all participating countries with-

out modifications whereas the compliance profiles serve as a quality assessment instrument. The SHARE Compliance Profiles report is based on a set of quality control indicators, such as careful implementation of interviewer trainings, proper back checks of conducted interviews, high response rates, or a minimum number of contact attempts in households without an interview. All participating countries are evaluated on these indicators uniformly. The combination of ex-ante specifications and ex-post Compliance Profiles levels the playing field for all participating countries and allows for a fair comparison of national survey quality.

### Survey participation and representativeness in SHARE

In addition to the compliance profiles that report how quality standards were adhered to in SHARE, further information on both the participation of respondents in their first (baseline/refreshment) interview as well as the longitudinal development of the survey so far are presented in the technical report “Survey Participation in the Survey of Health, Ageing and Retirement (SHARE)”. This report is updated with every data release (the most recent one was published as SHARE Working Paper 81-2022) and describes how many households and individuals of the initial gross sample delivered completed interviews, how many were found to be ineligible, and how many did not respond. Survey participation patterns are presented separately for baseline and refreshment samples as well as longitudinal samples for countries that have

already participated in SHARE before. Whereas in the context of baseline and refreshment samples the focus is on response behaviour towards the initial survey request, for the longitudinal samples the focus is on response behaviour in subsequent waves, i.e., on panel retention. Especially the latter is of utmost importance to exploit the full potential of SHARE regarding longitudinal analyses. Only if persons can be observed repeatedly as time passes by, it is possible to understand individual ageing processes and to learn how respondents adapt to the changing environment over time. Taken together, the compliance profiles and the report on survey participation provide users of SHARE with the information needed to evaluate their results and conclusions in terms of representativeness and quality of the data.

#### Literature:

Bergmann, M. Kneip, T., De Luca, G., & Scherpenzeel, A. (2022). Survey participation in the Eighth Wave of the Survey of Health, Ageing and Retirement in Europe (SHARE). Based on Release 8.0.0. SHARE Working Paper Series 81-2022. Munich: SHARE-ERIC. DOI: [10.17617/2.3390284](https://doi.org/10.17617/2.3390284).

Yilmaz, Y., Lasson, S., Hannemann, T., Schuller, K., Börsch-Supan, A. (2023). SHARE Compliance Profiles – Wave 9. Munich: MEA, Max Planck Institute for Social Law and Social Policy. Can be downloaded here: <https://share-eric.eu/data/data-documentation/methodology-volumes>





# 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. Linking data is a complex procedure and goes along with several challenges on different levels – legal, technical, and organisational such as reaching an agreement with data-providing institutions (Herold et al., 2021). The development and implementation of record linkage projects in an international survey like SHARE is especially challenging, because different preconditions in specific countries have to be taken into account. Therefore, record linkage projects are developed and implemented for each country individually and the responsibility for linkage projects lies with the country teams. SHARE Central supports the development by coordination and harmonization. Currently there are ongoing linkage projects in eight SHARE countries as pictured in Figure 1.

Linked data sets broaden the research possibilities, as shown in the two following examples:

Bühler et al. (2022) conducted methodological research using the German linked data set SHARE-RV. They compared life histories from survey and administrative data over the duration of 30 years using the SHARELIFE data set as well as the VSKT data set from the German Pension Insurance (containing employment histories). They found that there is a huge overall similarity between both data sources of about 80 to 90 percent. But they also found that

retrospectively collected life course data in surveys is more likely to deviate from administrative data the more varied life courses are. This can be especially seen for groups that typically have more inconsistent life courses, e.g. women, people with low education or people working in the tertiary sector.

Brønnum-Hansen et al. (2023) analysed the development of education-specific life expectancy and health expectancy among Danish SHARE respondents using the REGLINK-SHAREDK data from 2004 to 2015. The register data from Statistics Denmark provide accurate information on education while SHARE survey data contain certain health measures, e.g. information on long-term illness or self-rated health. They found that overall life expectancy at age 50 increases between 2004 and 2015, while previously observed improvements in health expectancy slowed down in the same time. This development goes along with relatively steady educational inequalities regarding life as well as health expectancy. Discrepancies of social inequality between life and health expectancy can have implications on strategies for fair pension reforms taking into account expected years in good health

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.

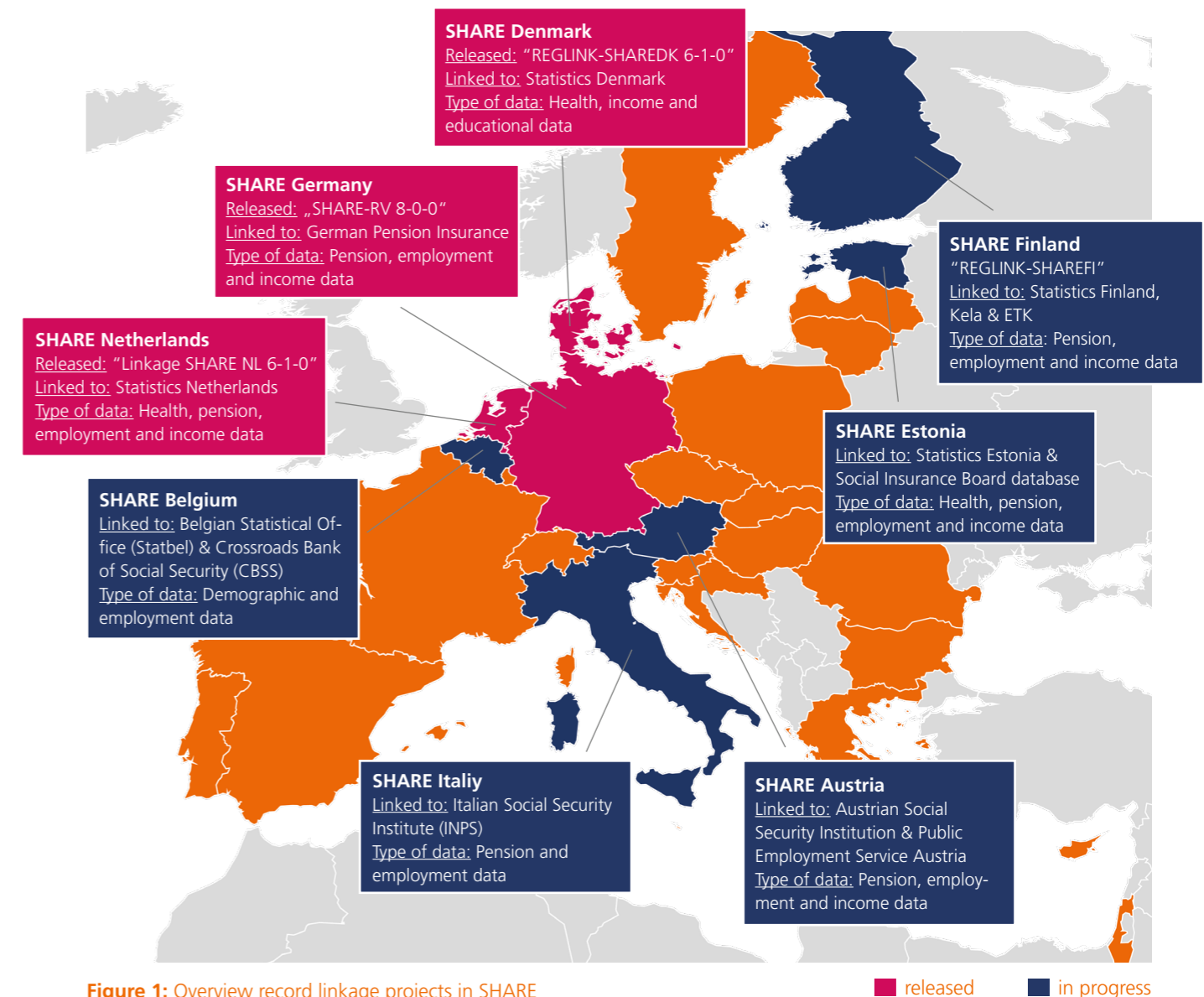


Figure 1: Overview record linkage projects in SHARE

■ released ■ in progress

### Literature:

Brønnum-Hansen, H., L. Németh, D. Jasilionis and E. Foverskov (2023): National and education-specific trends in life and health expectancies in Denmark 2004–2015. *Scandinavian Journal of Public Health*. DOI: [10.1177/14034948221144348](https://doi.org/10.1177/14034948221144348).

Bühler, B., Möhring, K. & Weiland, A.P. (2022): Assessing dissimilarity of employment history information from survey and administrative data using sequence analysis techniques. *Qual Quant*. [doi.org/10.1007/s11135-022-01333-9](https://doi.org/10.1007/s11135-022-01333-9).

Herold, I., Y. Pettinicchi, D. Schmidutz (2021): Harmonising Record Linkage Procedures in SHARE. In: Bergmann, M., A. Börsch-Supan: *SHARE Wave 8 Methodology: Collecting Cross-National Survey Data in Times of COVID-19* (S. 193-197). Munich: MEA, Max Planck Institute for Social Law and Social Policy. <https://share-eric.eu/data/data-documentation/methodology-volumes>

# 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 subjective information derived from respondents' answers, objective health measures have always played an important role in SHARE. Such measures facilitate comparisons across countries and allow adjustments of self-reported 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. Indicators such as accelerometer data, grip strength and walking speed are helping to provide a precise understanding of healthcare demand and utilisation across the di-

versity of national healthcare and health insurance systems. Further, the revision of the cognition module and add-on study SHARE-HCAP help us better understand different pathways of cognitive ageing while at the same time harmonising our data with other aging studies in the world.

The following pages provide an update on SHARE's dedication to offer deeper understanding of health and aging using novel measurement strategies for population-based studies: Accelerometer data, the Harmonized Cognitive Assessment Protocol (HCAP) and Dried Blood Spot (DBS) sampling, known as the SHARE Biomarker Project.



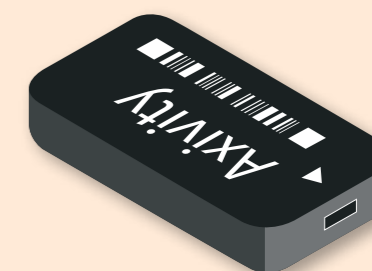
## ACCELEROMETER STUDY

To measure physical activity of the SHARE respondents, the SHARE accelerometer study was conducted in Wave 8 in ten countries. A subsample of respondents were asked to wear an accelerometer – a device that captures acceleration – on their thigh for consecutive 7 days. Data derived from the accelerometer measurements are available since 2021, with a major update in February 2022, now providing even more detailed information on movements of the participating respondents. First peer reviewed articles using the SHARE accelerometry data have been released in 2022.

In April 2022, SHARE signed the Memorandum of Understanding to participate in the Prospective Physical Activity, Sitting and Sleep consortium (ProPASS). One of the aims of ProPASS is to build a pooled data resource on physical activity, posture allocation, sleep, and health outcomes. SHARE is

one of the studies that committed to provide harmonised data for this endeavour. Joining ProPASS will enable researchers to combine the SHARE accelerometry data with data from other studies – all conducted thigh-worn accelerometer measurements – from all around the world, hence making their analysis more impactful.

At the SHARE user conference in Bled, Slovenia in October 2022, SHARE users had the opportunity to attend a workshop on the SHARE accelerometry study. The workshop covered the basics of physical activity research, advantages and disadvantages of self-reports and device based measurements of physical activity, an overview of device based metrics, and, of course, detailed information on the SHARE accelerometry study and how the available data can be used.



## SHARE-HCAP: THE HEALTH STUDY

The main activities for SHARE-HCAP took place parallel to SHARE Wave 9 fieldwork. SHARE Wave 9 accounts for two phases: one telephone interview conducted during summer 2021 (Corona Survey II) and one in person interview started during fall 2021. The first SHARE-HCAP pretest followed the first phase of Wave 9, and the second pretest followed the second phase.

For the first pretest, a two-day training event was organised for our local collaborators in Czech Republic, Denmark, Germany, France and Italy, on how to implement the pretest. The teams were responsible for recruiting interviewers with relevant experience to conduct the interviews in July-August 2021. Due to the group-size, we were able to train the interviewers centrally for this pretest.

For the second pretest (November 2021 – February 2022), we followed the standard format of SHARE of Train-the-Trainer (TTT) workshops, who would then transfer their knowledge to the local interviewers during their National Training Sessions (NTS). The main data collection took place between May and October 2022 and further data analyses are planned for the upcoming period.

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.

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

## THE SHARE BIOMARKER PROJECT

We

- completed laboratory analyses of all SHARE Wave 6 DBS samples
- performed validation experiments mimicking the fieldwork conditions for all markers,
- corrected the analysis values for fieldwork conditions, storage time, varying spot size, and changes in the laboratory,
- and created equations to convert the raw DBS assay results into venous-blood equivalents for research by data users.

In Wave 6 in 2015, SHARE had implemented the collection of dried blood spot (DBS) samples as an additional and objective measurement of health. About 25,000 samples from respondent in 12 countries could be assayed for some or all biomarkers, which SHARE had intended to analyze. The analyses for routine blood markers took place in 2017/2018 (first batch) and 2020/2021 (second batch) at the University of Washington (UW), Seattle, USA and in 2018 at the Statens Serum Institut (SSI) in Copenhagen, DK for the cytokine marker set (intended to investigate cognitive decline<sup>1</sup>).

For all markers analyzed at UW, we gained reliable conversion equations to correct for the field impacts, and to translate the raw DBS values into venous-blood equivalents for subsequent research<sup>2</sup>.

In 2021, we further refined the equations by considering the additional impact of storage time for the marker value experienced by the samples of the second batch. Then, we investigated and corrected for the impact of the hugely varying spot sizes of the collected DBS on the marker value. The precise measurement of spot size and its impact on the marker value was published in 2022<sup>3</sup>. A paper researching the impact of childhood conditions and late-life low-grade inflammation (CRP) followed in 2023<sup>4</sup>.

The publication of the cytokine validation afforded further analysis at SSI to show that ApoE4 protein levels gained from a DBS render meaningful information compared to the current standard of identifying carriers of the ApoE ε4 gene by DNA analysis. In line with SHARE ethical rules, we analyzed DNA from the DBS samples of deceased SHARE participants from Denmark, Estonia and Spain, countries, which do not exclude re-analysis incl. DNA assays. We could demonstrate that our protein assay and the genetic analysis yield comparable results.

An extensive documentation of the many steps from implementation of DBS in SHARE to a user-friendly data set has been prepared. We will release the data after the completion of all validity checks.

- 1 Börsch-Supan, M., Weiss, L., Andersen-Ranberg, K., & Börsch-Supan, A. (2020). Collection of dried blood spots in the Survey of Health, Ageing and Retirement in Europe (SHARE): From implementation to blood-marker analyses. SHARE Working Paper Series 47-2020. DOI: [10.17617/2.3245285](https://doi.org/10.17617/2.3245285).
- 2 Börsch-Supan, A., Weiss, L.M., Börsch-Supan, M., Potter, A.J., Cofferen, J. & Kerschner, E. (2021). Dried blood spot collection, sample quality, and fieldwork conditions: Structural validations for conversion into standard values. American Journal of Human Biology 33(4). DOI: [10.1002/ajhb.23517](https://doi.org/10.1002/ajhb.23517).
- 3 Groh, R., Weiss, L. M., Börsch-Supan, M., & Börsch-Supan, A. (2022). Effects of spot size on biomarker levels of field-collected dried blood spots: A new algorithm for exact dried blood spot size measurement. American Journal of Human Biology 34(10). DOI: [10.1002/ajhb.23777](https://doi.org/10.1002/ajhb.23777).
- 4 Horton, H.M. (2022). The long arm of childhood hypothesis and systematic low-grade inflammation: Evidence from parental education of older European adults. SSM Population Health 21. DOI: [10.1016/j.ssmph.2022.101334](https://doi.org/10.1016/j.ssmph.2022.101334).

# SPLASH

## The Social Policy Archive for SHARE

The “Social Policy Archive for SHARE” (SPLASH) aims to overcome existing data limitations in order 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 addition to adapting the database structure for hosting new resources and upgrading the online interface, during 2022, the database development followed three main lines.

First, the contextual data collection addressing transnational differences related to the COVID-19 pandemic has been progressively integrated into SPLASH. This addresses public health, containment measures and epidemiological indicators for the period between 2020 and 2022. For the main areas of research covered by the SHARE-COVID19 project (employment, healthcare, social life), the mapping and data collection considered the period

before and during the pandemic. Special attention was given to identifying data and research resources at subnational level as a mean to characterize the subtleties of healthcare delivery and employment-related measures with the potential to elucidate ex-ante and ex-post changes within the context of COVID-19. As a result, almost 440 variables with sub-national disaggregation and more than 100 resources for the data map were compiled.

Second, the activities were focused on updating and expanding the data map and the collection of macro indicators for the analysis of the regular SHARE Waves. In addition to essential demographic indicators, these cover fields such as employment and retirement, public health and educational policies. The collection of long-series comparative indicators was prioritized to facilitate longitudinal analysis whenever possible with series starting as early as 1935. All contents are updated regularly, and new indicators of interest are added in response to social and economic developments.

Finally, to support the research on the unintended effects of containment policies on the living conditions of individuals across Europe, the policy-specific work focused on the revision and update of data recording job retention measures implemented to combat unemployment and loss of income during the pandemic. These include short-time employment, wage subsidy programs and combined measures at national level. To do so, the activities involved revising and coding data from reports from international organizations and sources, as well as the search of specific legislation in national

sources. As a result, a total of 87 reports addressing job retention schemes or labor policy responses were identified and compiled. Furthermore, the main components of the national measures such as duration of the benefits have been coded for

their subsequent revision and evaluation. This exercise will continue during the first quarter of 2023 to integrate the latest data and policy instruments available until the end of 2022.



The screenshot displays the SPLASH database website interface. At the top, there is a navigation bar with links for POLICY, DATA, ABOUT US, SEARCH, LOGIN, and AAA. Below the navigation bar is a search bar with the text "Search for...". The main content area features a large image of a crowd of people and a "Welcome to SPLASH" message. Below the welcome message, there is a search bar with the text "Search for..." and a "DATA" dropdown menu set to "COVID-19". The search results section shows "167 Results" and lists various data sources and indicators related to COVID-19, including "COVID - 19 Data" and "Oxford COVID-19 Government Response Tracker".

# SHARE USERS

Number of users per country



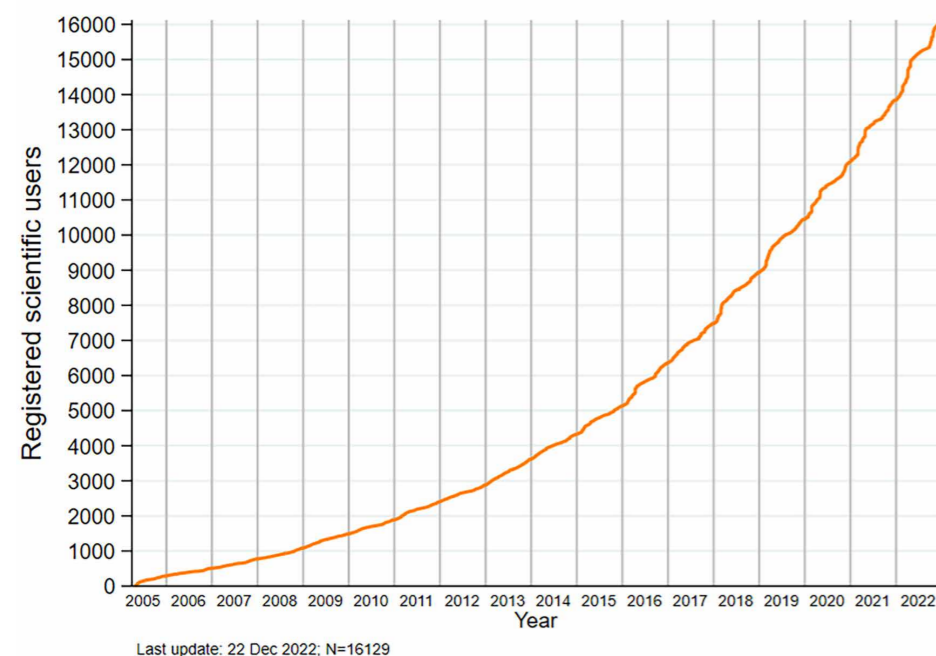
# CONSTANTLY ON THE RISE

## New record for SHARE user registrations in 2022

By the end of December 2022, SHARE counted a total of 16,129 user registrations. As in previous years, the total number of registered users as well as the annual growth rate has increased. Therefore, more than 2,200 new registrations were recorded in 2022 – an all-time record for SHARE’s annual growth rate. 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. SHARE 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 in

the background of its users, who come from all over the world. In 2022, SHARE had users from 81 countries. This international community brings perspectives from different scientific disciplines, societies and cultures. The country with the highest number of registered users remains Germany with more than 3,184; followed by the Netherlands with around 1,660 registered users and the United Kingdom with more than 1,330. Italy, with 928 registered users, moved up to fourth place in 2022. The USA, with 918 registered users, now rank fifth while also being the country with the highest number of SHARE users outside of Europe.

Figure 1: SHARE Data Users



# SUPPORTING THE SHARE USER

## Workshops and other user support activities

In addition to the SHARE User Conference in Bled, there were several other SHARE user workshops, trainings, seminars, and summer schools in 2022. A “SHARE Data User Seminar” took place in April and was organized by the Lithuanian country team. The summer school “VIU Summer Institute of Ageing” took place in June at the Venice International University and included two workshops on SHARE data. Also in June, the Latvian country team organized a seminar on “Promotion of healthy ageing, welfare and social security” at the Riga Stradins University. The manifold opportunities of combining SHARE survey data with administrative data were discussed in September at the SHARE-RV workshop of the German Research Network of the Statutory Pension Scheme (FNA). A student seminar using easySHARE data was organized by the Bulgarian country team. It took place in October at the Faculty of Economics of the Sofia University. SHARE was also used in a number of other student courses (e.g., at the Hebrew University of Jerusalem, the University of Haifa and the University of Cyprus). Lastly, the “SHARE squared” workshop was given by the Italian country team in December.

Apart from establishing direct contact between the SHARE team and users of SHARE data at workshops and seminars, the team at SHARE Central has launched a wide range of user support activities. Following the FAIR (findable, accessible, interoperable, reusable) principles, a detailed and

understandable description of SHARE data and metadata is at the center of our user support activities. The different releases of SHARE data – all of which are accessible free of charge to scientists worldwide after a registration process – can be identified with the release number used to indicate data updates. The release number is included in the DOI (digital object identifier) of each dataset and is also used for the versioning of documentation files. Comprehensible and continuously updated documentation of all datasets is an essential prerequisite for researchers from many countries and different scientific disciplines to be able to work with SHARE. An overview of all available documentation files is provided at <https://share-eric.eu/data/data-documentation>.

Another important part of our user support is the maintenance of the info@share-project.org e-mail account. Users can send all kinds of SHARE-related questions to this account. Responding to the researchers’ questions within a short period, SHARE Central provides and further explains documentation material, answers questions on structure and content of the data, assists prospective users with the data access procedure, records SHARE-based publications, and – if necessary – forwards specific requests to country teams, area coordinators or the experts for weights and imputations. In 2022, the database management team at SHARE Central answered more than 570 user questions.

# 7<sup>TH</sup> SHARE USER CONFERENCE

## Scientists met in Bled to discuss the ageing societies in times of crises

From 5 to 7 October 2022, the 7<sup>th</sup> SHARE User Conference took place in Bled, Slovenia organized by the Institute for Economic Research in Ljubljana in cooperation with SHARE-ERIC. Scientists who use SHARE data from all over the world met to discuss SHARE-related research on the theme of “Ageing Societies in Times of Health, Social and Economic Crises”. Around 50 scientific papers were presented in parallel sessions and a poster session, offering insights and an opportunity for discussion on various aspects of ageing and by involving researchers from different scientific fields. The impact of the COVID-19 pandemic on the mental health or economic stress of older people, adherence to preventive measures and vaccination uptake in the over-50 population,

and labour market disruption during the pandemic were examined in several papers using SHARE-COVID19 datasets. Other presentations covered long-term care; economic and environmental impacts on well-being; gender differences in care regimes, work and public pension systems; and loneliness, anxiety and personality types. In addition, methodological issues such as causality as well as interviewer effects in the SHARE survey were covered.

The conference shed light on the future of SHARE (SHARE 2.0) and offered the chance to attend two dedicated workshops on the SHARE Accelerometer Study and machine learning approaches with SHARE data.



Conference booklet and material at the SHARE User Conference in Bled



Yuri Pettinicchi, Ph.D., Head of Questionnaire Development, at the SHARE User Conference in Bled

Reference: © Matej Mišič



# SHARE USERS

# ALL OVER THE WORLD





# SHARE-BASED JOURNAL PUBLICATIONS 2022

## A–B

Achdut, N. and L. Achdut (2022): Joint income-wealth poverty in a cross-national perspective: The role of country-level indicators. *Social Indicators Research*. DOI: 10.1007/s11205-022-02959-w.

Albuquerque, P. (2022): Met or unmet need for long-term care: formal and informal care in southern Europe. *The Journal of the Economics of Ageing* 23. DOI: 10.1016/j.jeoa.2022.100409.

Alderotti, G., C. Tomassini and D. Vignoli (2022): ‘Silver splits’ in Europe: The role of grandchildren and other correlates. *Demographic Research* 46 (21): 619-652. DOI: 10.4054/DemRes.2022.46.21.

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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

## Using SHARE data for optimal policy design

“Health and illness are not determined from birth; social and spatial factors also play a major role. Good, internationally comparative information on people’s life courses can show us which factors determine our health, our life expectancy, our life course. Only then can we learn, prevent and help. SHARE provides this important data and is therefore invaluable for social research.” says Prof. Dr. h.c. Jutta Allmendinger, Ph.D., president of the WZB Berlin Social Science Center.

In 2011, the European Commission identified population ageing as one of the most pressing challenges of Europe in the 21<sup>st</sup> century. In order to respond to its economic, social and health consequences with evidence-based policymaking, an up-to-date data infrastructure was needed. SHARE filled this role, becoming the first-ever European Research Infrastructure Consortium. Since its initial setup, SHARE has supplied policymakers with reliable and comparable data to base their decisions on. In 2022, the survey has continued to serve as a valuable source for a wide range of policy analyses – from a Flemish policy plan to combat loneliness and increase social participation among the elderly, to an OECD analysis

on how to improve access to and quality of end-of-life care. Further, SHARE research provides insights into the unintended health, socio-economic and environmental consequences of epidemiological containment decisions and the long-term effects of the COVID-19 pandemic through its life-course and multidisciplinary approach, combining health and socio-economic data. The move to Berlin, a central hub for European and international policymaking, in early 2023 will further strengthen SHARE’s role as a valuable resource for data-driven decisions. Please find here some selected examples to illustrate the SHARE’s contribution to national, European and global evidence-based policymaking.

## ON THE NATIONAL LEVEL

### BELGIUM

Policy plan for the Flemish population 50+



To fulfil their self-declared goal of combating loneliness and strengthening social participation among the elderly, the Flemish government has developed a detailed policy framework: “The Policy Plan for the Elderly 2020-2025”<sup>1</sup> (Vlaams Ouderenbeleidspan 2020-2025) includes concrete investments in affordable care, the creation of quality living environments for older people and measures to increase dementia-sensitivity within the Flemish society. The report draws on SHARE data to illustrate the state of subjective health, feelings of loneliness and social well-being among elderly citizens, particularly in the context of the COVID-19 pandemic. Taking these data as a foundation, the Flemish government aims to respond to the needs of the 50+ population by facilitating social participation with targeted political measures.

### GERMANY

Migration as a chance and challenge to health care



In its assessment for the year 2022<sup>2</sup>, the German Council of Experts for Integration and Migration evaluated the role of migrants in the German health care system. The independent scientific committee stressed that immigrant employees are essential to the functioning of the national

health system. Simultaneously, it addressed the need to facilitate integration into the labour market and improve working conditions as well as increase health literacy among socioeconomically disadvantaged groups of migrants. The paper uses SHARE data to demonstrate mental health inequalities in the German society: According to SHARE, immigrants manifest depressive symptoms significantly more often than the native population. The mental strain is particularly high for refugees. The council’s assessment shows, that for the considerable contributions migrants make to the German health care system, challenges remain.

### MALTA

National Strategy for Public Health



In the light of demographic change, the Maltese government is ensuring that its public policy reflects the unprecedented rise of an ageing population. The country’s Ministry for Active Ageing, dedicated specifically to the needs of older persons, published its second active strategy, the “National Strategic Policy for Active Ageing 2023-30”<sup>3</sup>. The lead author of this policy paper is Prof. Marvin Formosa, who also occupies the role of Malta’s country team leader for SHARE. Based on the longitudinal data offered in SHARE, the strategy takes a life course approach to define the individual, social and institutional factors driving a healthy aging process. In particular, the paper formulates measures to expand long-term care services and make them more accessible to the older population in its socio-demographic diversity.

1 <https://tinyurl.com/FlemishPolicyPlan2022>  
2 <https://tinyurl.com/SVRannualreport2022>  
3 <https://tinyurl.com/NSPActiveAgeingMalta>



## SLOVENIA

### Contribution to the UN's Open-Ended Working Group on Ageing



In 2010, the United Nations established the Open-Ended Working Group on Ageing<sup>4</sup> (OEWGA) to identify and politically respond to gaps and grievances in the human rights situation of older persons. The group brings together UN Member States, national human rights institutions, NGOs and UN agencies in an annual meeting. The 13th session, to be held at UN Headquarters in New York in April 2023, will focus on the two areas “Right to Health and Access to Health Services” and “Social Inclusion”, for which all members of the OEWGA were asked beforehand to provide their input and respond to specific questions on the focus areas. The input for the first area for Slovenia was provided by the Slovenian SHARE country team and was based on SHARE data. It highlighted how SHARE can help to access information on older people's access to health care and services, thus providing a scientific basis for responding to inequalities in older people's right to health.

## ON THE EUROPEAN LEVEL

### EUROPEAN COMMISSION

#### Cultural heritage and older adults' loneliness and health

Loneliness is widely recognized as a public health issue often affecting the elderly. The way one ex-

periences loneliness, researchers have argued, is dependent on a variety of environmental factors, including cultural norms and understandings. In the technical report “Loneliness and health of older adults: The role of cultural heritage and relationship quality”<sup>5</sup>, The European Commission's science and knowledge service, the Joint Research Centre, focuses on the self-perceived loneliness of second-generation immigrants aged 50+ and its impact on mental and physical health. Containing widespread current and retrospective information on respondents' health and demographic background, SHARE is the study's main data source. Using data from SHARE Waves 5 to 8, the report links maternal cultural background to perceived quality of relationships and loneliness. Further, loneliness, is found to influence one's general health status.

#### EU Non-Communicable Diseases Initiative

Around two thirds of all deaths in the European region currently result from non-communicable diseases (NCDs), such as diabetes, cardiovascular diseases and chronic respiratory conditions. Significant inequalities in life expectancy and mortality rates exist both between different EU countries and socioeconomic groups within a country. In order to combat NCDs, the EU has launched an initiative to support member states in developing and implementing effective policies focused on health promotion and disease prevention. The European Commission refers to prevention as one of the most underinvested areas in public health EU-wide so far. As mentioned in the initiative's guidance document “Healthier Together”<sup>6</sup>, SHARE forms part of the European information network in the study of health policies. The survey's results contrib-

ute to the scientific background for the EU's initiative against NCDs.

#### European Day of Demography

Throughout the last decades, the average life expectancy has kept increasing on a global level. However, existing inequalities between socio-demographic groups are mirrored in the aging process – even within Europe. Under the headline “European Day of Demography”<sup>7</sup>, a number of European and national institutions organized a public debate on population disparities in healthy ageing in February 2023. The invited guests included Dubravka Šuica, Vice-President of the European Commission for Democracy and Demography, and Prof. Dr. Axel Börsch-Supan, managing director of SHARE, who has largely dedicated his research to the economic and health dimensions of demographic change. The event took place in Berlin, Germany and opened opportunity for scientific, political and public exchange.

## EUROPEAN PARLIAMENT

### Fostering coherence in EU health research

The COVID-19 pandemic prompted massive efforts and investments in European health research and highlighted both strengths and weaknesses in the organisation of EU research. One of the main weaknesses identified is the fragmentation of strategies and responsibilities. In the paper “Fostering coherence in EU health research”<sup>8</sup>, published in October 2022, the European Parliamentary Research Service (EPRS) analyses how to foster coherence in EU health research. In the report, EPRS identifies publicly-funded research and health data

that feed into public health and health policy decisions as key aspects of health research that were essential for the Covid-19 response of the EU – and mentions ERICs like SHARE-ERIC, among others, as effective investments in collaborative research. In the report, SHARE-ERIC stands out as a research infrastructure that manages to incorporate all EU Member States – a goal and unique selling point achieved by SHARE in 2017. The report concludes with 7 concrete options for policy makers on how to foster coherence in health research.

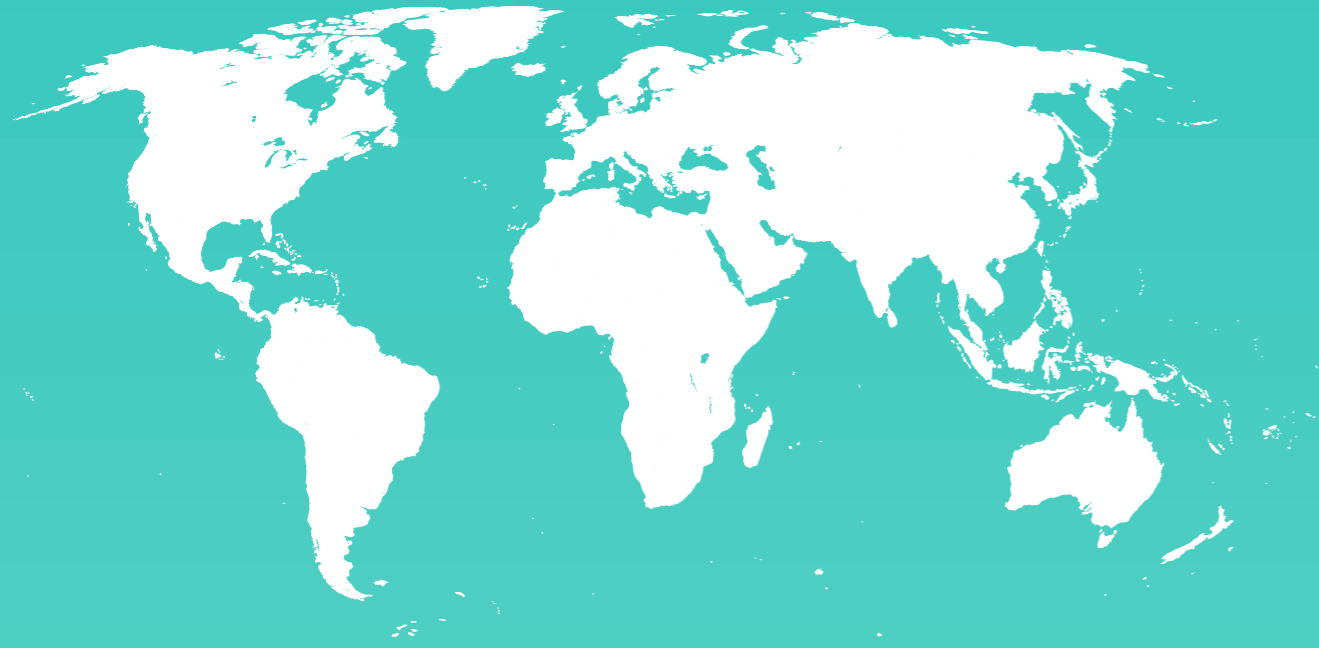
<sup>4</sup> <https://social.un.org/ageing-working-group/>

<sup>5</sup> <https://tinyurl.com/JRCreport2022>

<sup>6</sup> <https://tinyurl.com/HealthierTogether2022>

<sup>7</sup> <https://tinyurl.com/DayOfDemography2023>

<sup>8</sup> <https://tinyurl.com/CoherencelnResearch2022>



## ON THE GLOBAL LEVEL

### OECD

#### Health at a Glance: Europe 2022

The biennial OECD report “Health at a Glance: Europe”<sup>1</sup> presents and compares key indicators for population health, health care resources and activities, health expenditure and financing across EU member states. For the first time, the report also includes key indicators for Ukraine and Moldova. The 2022 edition of “Health at a Glance” focuses on the resilience and crisis preparedness of health systems through targeted investments, their digital transformation as well as the prevention of cancer and other non-communicable diseases. The report also sheds light on the aftermath of COVID-19: In

this context, it refers to SHARE data to highlight that people with chronic conditions have been particularly impacted by the disruption of services during the pandemic.

#### Increasing Access to and Quality of End-of-Life Care

With an ageing population and an increase in chronic diseases, the share of the population in need of end-of-life care will continue to grow. Laying the groundwork for evidence-based policy-making, the OECD published the report “Time for Better Care at the End of Life”<sup>2</sup> on the challenges involved with this development. The authors use findings from the SHARE survey to evaluate the accessibility of formal care as well as its funding, quality and compatibility with patients’ wish-

es. Cross-country insights on the financial burden of informal care, on the healthcare inequalities by education and place of residence and on the extent of care provision are derived from SHARE data. This information from European countries is then placed in a global context. By further adjusting services to patients’ needs and deepening care coordination, the authors conclude, one could ensure more humane care at the end of life.



<sup>1</sup> <https://www.oecd.org/health/health-at-a-glance-europe/>  
<sup>2</sup> <https://doi.org/10.1787/722b927a-en>

# OPERATIONAL ASPECTS

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

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

# SHARE-ERIC COUNCIL MEETINGS 2022

## 1. SHARE-ERIC Council in Munich

The 14<sup>th</sup> SHARE-ERIC Council meeting was held in Munich on Tuesday 17 May 2022. 11 out of the 16 SHARE-ERIC countries were physically present at the meeting.

The meeting, led by the SHARE-ERIC chair, Dr. Sandro Holzheimer, focused on the presentation of the newly founded SHARE BERLIN Institute GmbH. The plan for this new entity, which is replacing the Max Planck Institute, had been approved at the previous SHARE-ERIC Council in June 2021. Since then, five founding institutions have come together to bring the new institute to life. It will serve as the home for SHARE Central and was further introduced to the ERIC delegates at the current meeting.

Three new members of the SHARE-ERIC Management Board were elected: David Richter, Agnieszka Chłoń-Domińczak and Martina Brandt. In addition, David Richter was appointed Director of the SHARE Infrastructure at the new SHARE BERLIN Institute.

Other topics discussed included the future scientific content of SHARE - retirement of the baby boom, flexible and tailored long-term care, prevention as a challenge for public health, and inequality – as well as future methodological changes of the SHARE study – for example the introduction of phone- and web-questionnaires and the collection of hard data like geo-coding. Karin Schuller, Head of Operations, presented SHARE's activities in 2021. She highlighted the successful implementation of the 1<sup>st</sup> Corona telephone survey, the development of a multi-mode

tool and the conduction of an interviewer survey. The development of HCAP as a sub-study on cognition, which was fielded in five of the SHARE countries, the extension of the SPLASH database and the new SHARE data release 8.0.0 were also mentioned as further accomplishments.

## 2. Extraordinary SHARE-ERIC Council (virtual)

The second Council meeting of the year 2022, the 15<sup>th</sup> SHARE-ERIC Council Meeting, took place on Friday 11 November and was held virtually. This extraordinary meeting was scheduled due to the organizational changes, which SHARE has undergone and is still undergoing, with the move to a new host institution and a change in management.

SHARE-ERIC Managing Director, Prof. Dr. h.c. Axel Börsch-Supan, Ph.D., presented the state of affairs, mentioning the good fieldwork outcome for the SHARE Wave 9 panel sample and the ongoing preparations for SHARE Wave 10. The Director of SHARE Infrastructure, David Richter, presented the progress in the administrative set-up of the SHARE BERLIN Institute and introduced Sylvia Becker as the Administrative Director of this new Institute, who attended the meeting as a guest.

In light of the extension of SHARE beyond 2024, decided at in the first Council meeting in 2022, a revision of the SHARE-ERIC Statutes became necessary. The new Statutes were approved by the Council members and will enter into force in Jan-

uary 2025. Furthermore, several models for the long-term funding of the SHARE ERIC administration and the IT support of SHARE were discussed.



Participants of the 14<sup>th</sup> SHARE-ERIC Council Meeting

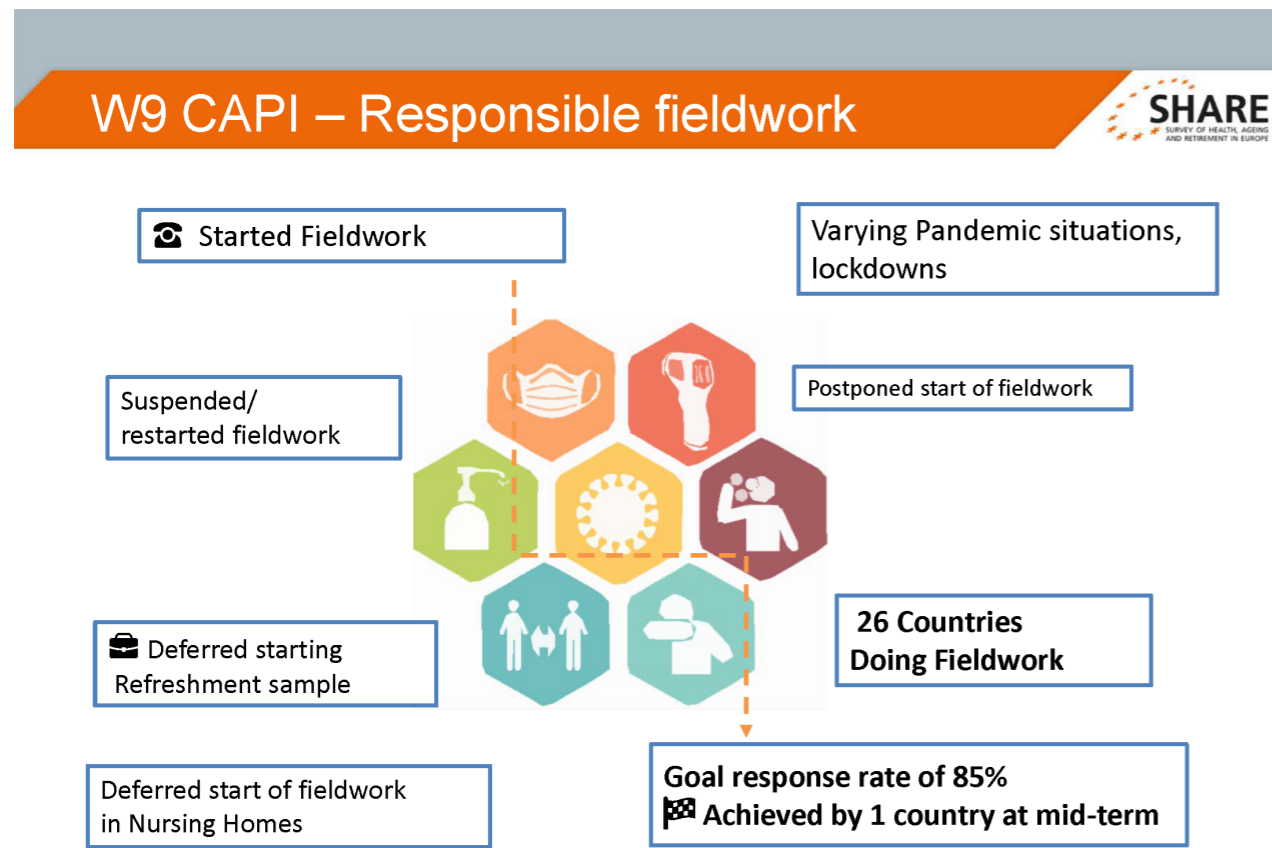
# SHARE WAVE 9 MID-TERM MEETING (VIRTUAL)

## SHARE researchers meet to discuss fieldwork progress

With the still ongoing global coronavirus pandemic, it was decided against meeting in-person which is why the SHARE Wave 9 Mid-Term Meeting was held virtually on 30-31 March 2022.

As the name suggests, the meeting took place while fieldwork for Wave 9 was still ongoing. Progress

and difficulties – especially related to the pandemic situation but also to the war in Ukraine – of fieldwork and resumed face-to-face interviews in the different countries were discussed. Further agenda items were an outlook of Wave 10 regarding the questionnaire, procurement, plans for drawing refreshment samples and financial planning.



# SHARE WAVE 10 PREPARATION MEETING (IN HELSINKI, FINLAND)

## Back to personal meetings

In spring of 2020, a SHARE meeting was planned to take place in Helsinki, Finland, when corona hit. Finally, two and a half years later, on 14-16 September 2022, the SHARE researchers could gather in-person for the SHARE Wave 10 Preparation Meeting in Helsinki.

Fieldwork of Wave 9 had just ended a month before and was evaluated during the meeting. Also, an update of the fieldwork for the HCAP study, which was fielded in spring/summer 2022 was given. Furthermore, important operational topics for Wave 10 like procurement, sampling, the new SHARE Consortium Agreement, the presentation of the new SHARE Website and EU grants were dis-

cussed and an outlook to future SHARE waves was made using a multi-mode survey approach.

Day two of the meeting was used to discuss certain topics in sub-groups i.e. the planning of a multi-mode experiment, next steps for record linkage, how to handle subsamples in SHARE or the software development plans for Wave 10.

The meeting was rounded off with a statement from the Scientific Monitoring Board of SHARE acknowledging the effort and struggles of going back to face-to-face fieldwork for Wave 9 and appreciating the plans for the future of SHARE which involve plans for multi-mode surveys.



SHARE Wave 10 Preparation Meeting at GLO Hotel Art, Helsinki

# SHARE-ERIC AND THE ERIC FORUM

## Off to new horizons – the ERIC Forum Project 2

The past year has marked the final year of the first ERIC Forum Implementation Project, a year full of prosperity and activity for the ERIC community. All 6 work packages of the ERIC Forum project, including work package 2 (Permanent Governance Model for the ERIC Forum), led by SHARE-ERIC, were successfully completed. The ERIC Forum published two policy briefs (on the impact of big science on the research ecosystem and on the assessment of the socio-economic impact of ERICs), organised policy seminars (on the socio-economic impact of ERICs) and webinars for the community (on best practices for contracting, insurance and intellectual property for ERICs), launched the ERIC Forum Toolkit (which aims to provide practical advice to ERICs and ERICs-to-be at different stages of their lifecycle with practical advice) and had the pleasure of welcoming two new ERICs, AnaEE- and MIRRI-ERIC.

The annual ERIC Forum meeting in January brought together key stakeholders such as European Commission representatives, ministries and ESFRI delegates, came together to focus on the long-term sustainability of ERICs and their role in the EU Research and Innovation arena. In October, the ERIC Forum held its General Assembly and at the same time final meeting in Brussels. 61 participants from 35 international organisations discussed topics like engagement with national policy makers, and a vision for 2023 and beyond. Furthermore, Antje Keppler (Director Bio-Hub, Euro-Biomedicine ERIC), and Allen Weeks (Director General ELI ERIC) were elected as the new ERIC Forum Chair and Vice-Chair, respectively. The structures for the elections and the rotating (vice-) chairmanship of the Forum are a product of the permanent governance model established by SHARE-ERIC during work package 2.



The ERIC Forum at the ERIC Forum General Assembly & Final Meeting of the Project in Brussels, Oct 2022

Most importantly, the meeting was the starting point for the preparation of a new grant proposal for the follow-up project, the Second Implementation Project for the ERIC Forum. The project has successfully started in January 2023 and will extend the ERIC Forum Project until 2027. It will further structure the cooperation between ERICs, support the implementation of the ERIC Regulation and

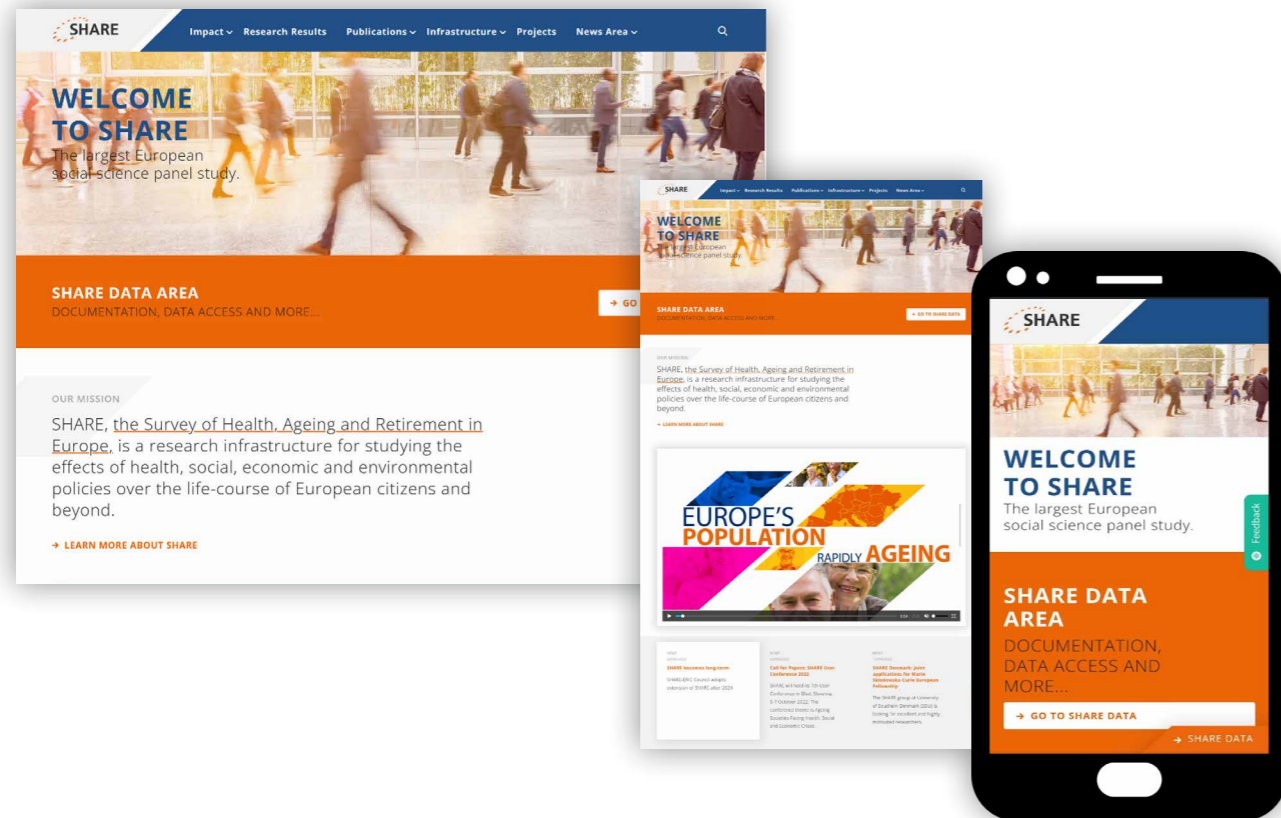
ERIC services, and consolidate the integration of the ERICs in the European Research Area by deepening the contribution of the ERIC Forum to research policies. SHARE-ERIC is pleased to again be involved in collaborations and joint actions across the ERIC landscape and to see the importance and relevance of the ERIC Forum as a key player in the ERA continuously increasing.

# SHARE PUBLIC RELATIONS

## Communicating effectively with different stakeholders

Adequate communication is key for SHARE. The SHARE-ERIC Public Relations team has to 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, EU and national ministry officials and respondents up-to-date with 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, such as the restructuring and relaunch of the SHARE-ERIC website.



## New Web Presence

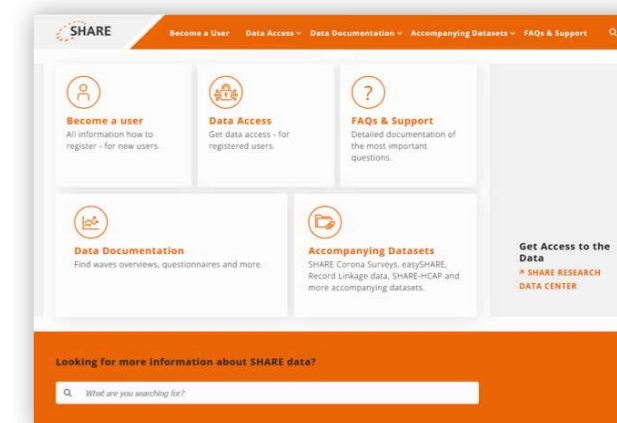
One of the biggest PR projects of the past year was the relaunch of the SHARE-ERIC website. As SHARE has grown over the years, there was an urgent need for a web presence that would reflect the complexity of SHARE in a simple and convenient way, and meet the needs of researchers and policy makers alike.

The website is now divided into two distinct areas: A blue section providing general information about SHARE, and an orange section aimed specifically at SHARE users.

The blue section describes the impact of SHARE on policy and science, gives an overview of the most significant research results over the years, provides information on SHARE's various projects and operational structure, e.g. management and staff information, SHARE's history and status as an ERIC, a news and PR section and, last but not least, an overview of all publications based on SHARE data. The publications are now held in a completely new database, which allows the user to filter by various criteria and to search for specific content using a keyword search function. The PR team is constantly updating the database and adding new publications.

The orange area, on the other hand, is designed to provide researchers with everything they need to work (or plan to work) with SHARE data. Here

visitors can get an overview and detailed information about the different SHARE Waves and special datasets, learn how to apply for SHARE data, and get a lot of other helpful input, e.g. methodological publications, questionnaires, release guides, and of course direct contact to SHARE support. A new feature is the citation generator, which helps SHARE users to get the correct citations for their publications among the variety of SHARE datasets.

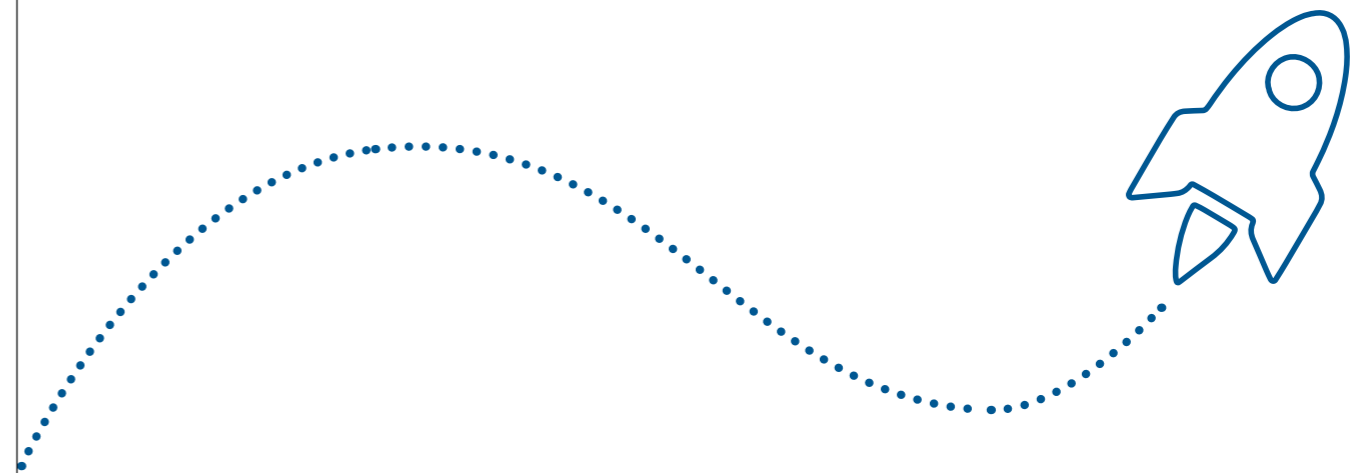
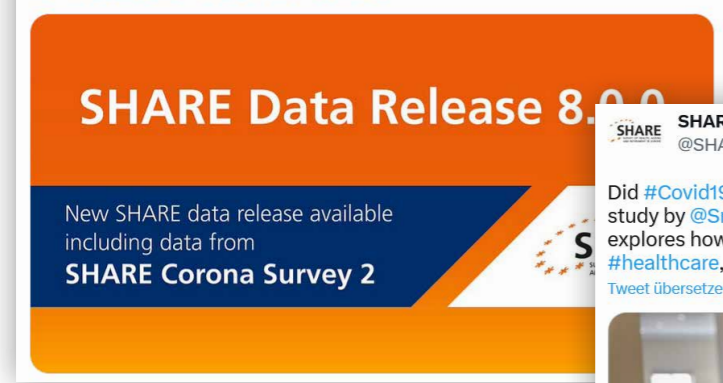
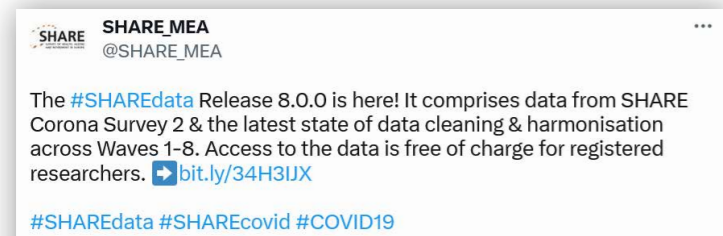


After a lot of testing, the website, which can be reached at [www.share-eric.eu](http://www.share-eric.eu), was launched in December 2022 and has since received a lot of positive feedback. It is built in a flexible way so that it can grow with SHARE and be adapted to future changes if needed. In addition to presenting SHARE in a modern and convenient look to the outside, the website also aims to make life easier for SHARE staff by introducing a new, easy-to-use intranet and a new newsletter tool that better suits SHARE's high-volume newsletters.

## 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 regular formats such as the dissemination of SHARE Findings, as well as news of online events and publications, exchange with partner projects, job vacancies and scientific updates. Throughout the last reporting period, the SHARE PR team ensured the visibility of the

survey through its online channels on Facebook, Twitter and, most recently, also 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 retweeting their SHARE-based research. This benefits 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.

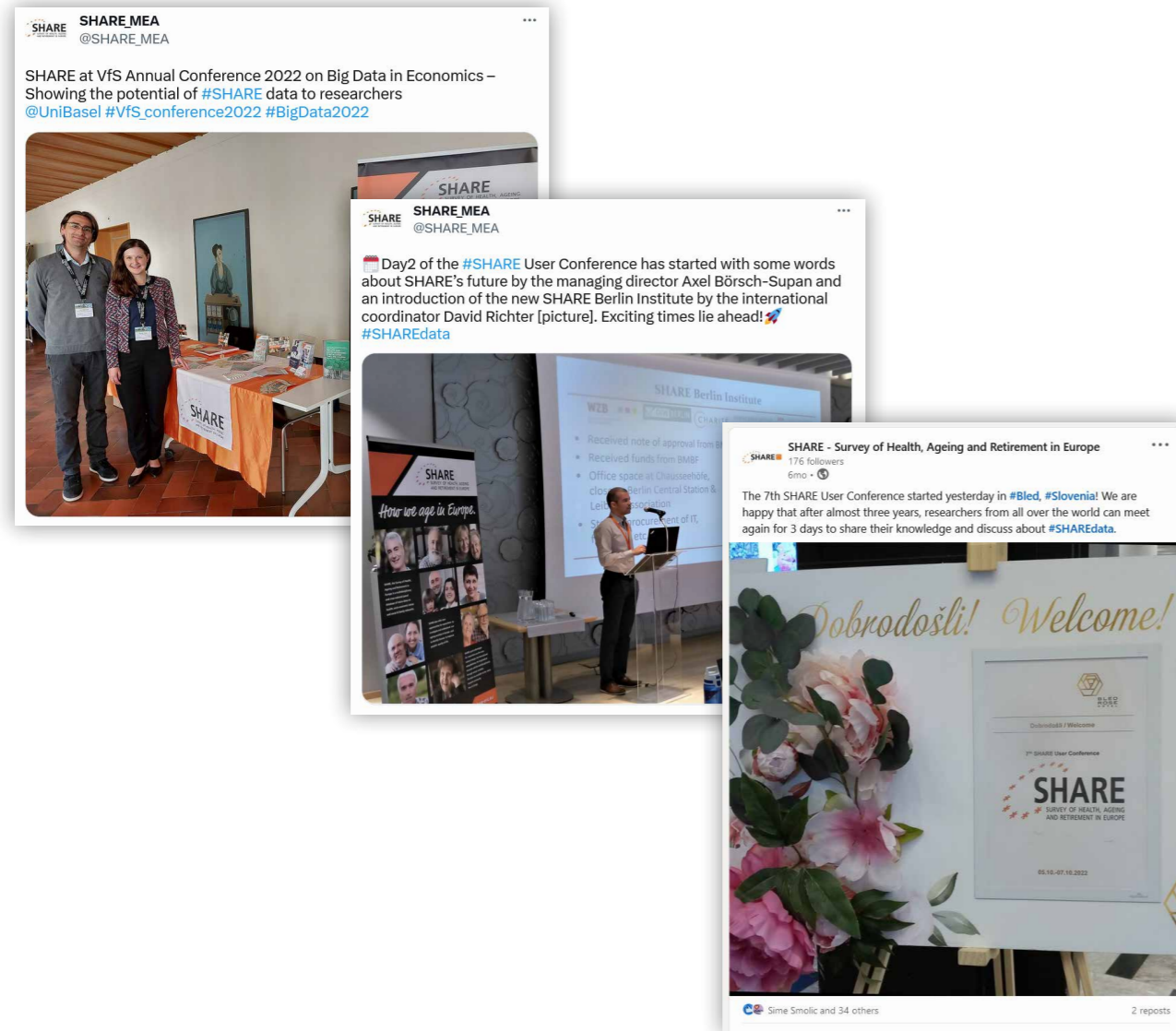




## PR Support for Conferences

Whenever SHARE and its researchers are represented at a conference around the globe, the PR team is there to support them in the background. When SHARE researchers spoke at events such as ESFRI's 20<sup>th</sup> Anniversary Conference in Paris in March 2022 or the International Conference on Research Infrastructures (ICRI) in Brno, Czechia, in October 2022, the PR team strives to maximise their reach by accompanying the events with press releases and so-

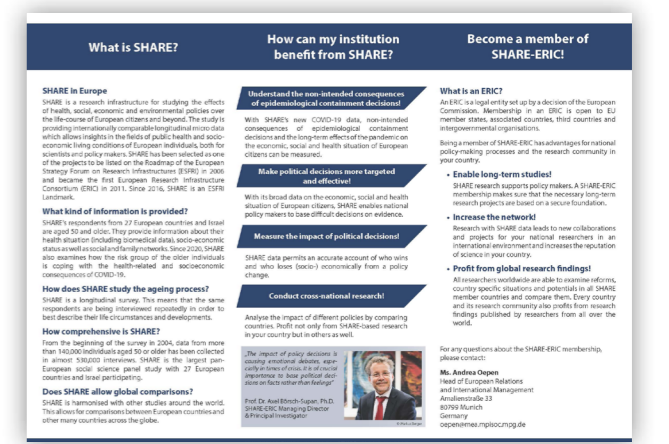
cial media coverage. On other occasions, like the Vfs Annual Conference in Basel, Switzerland, in September 2022, or the 7<sup>th</sup> SHARE User Conference in Bled, Slovenia, in October 2022, SHARE PR helps to supervise SHARE's info booths and distribute information and goodies to conference visitors. This includes 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.



## Creating PR Materials

SHARE PR by now has a wide range of materials to choose from, depending on what the audience and format requires. The materials are constantly evaluated and adapted, ensuring an up-to-date selection that can be drawn on as needed. This includes flyers, brochures, seasonal greetings cards, logos, and general design guidelines. In the past year, the flyer "Evidence-based policy making with SHARE data", targeted to policy makers in the EU

and national ministries, and the SHARE researcher flyer, targeted to SHARE's (potential) data users, have been updated. These materials are also made available to the SHARE country teams as templates to be adapted to country-specific needs and support the teams in their regional work. Following this approach, the Croatian SHARE country team has published a new brochure for Croatian respondents in 2022.



Updated SHARE Flyer "Evidence-based policy making with SHARE data"



SHARE Respondent Brochure translated into Croatian by the SHARE country team

# 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 pp. 24–25.

#### 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. 36.



#### SHARE COHESION

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

The central goal of this project is to upgrade SHARE-ERIC in all SHARE countries. This will improve the cohesion of the Survey of Health, Ageing and Retirement. In addition to integrating as many European countries as possible into SHARE and SHARE-ERIC, the project especially aims to improve the technical architecture, introduce scientific innovations and support central coordination, which is crucial for international cooperation and cross-national comparability.

#### SHARE-EUCOV

(The project started in August 2021 and ended in November 2022)

The overall aim of this project was to maintain full EU coverage in SHARE Wave 9 and Wave 10 to provide the largest possible SHARE database to the research community, the EU Commission, and supranational organisations such as OECD or WHO. This includes the data collection of Wave 9, data cleaning, and the first preparations of the Wave 10 questionnaire in 12 SHARE member countries. The aim was achieved through the support of DG Employment, Social Affairs and Inclusion in the eight EU member states that joined SHARE in Wave 7 (Finland, Latvia, Lithuania, Slovakia, Romania, Bulgaria, Malta, Cyprus) and in four "crisis countries" (Portugal, Spain, Greece, Estonia).

### Current Project Cooperations

#### SSHOC

(The project started on 1 January 2019

and ended on 30 April 2022)

On 11-12 March 2019, the Social Sciences and Humanities Open Cloud (SSHOC) project's kick-off took place in Utrecht. SSHOC will realize the social sciences and humanities part of the European Open Science Cloud (EOSC) by offering access to research data and related services adapted to the needs of the SSH community. SHARE is one of 47 organizations to take part in the project and leads the work package on "Innovations in data access".



#### ERIC-Forum

(The project started on 1 January 2019 and ended on 31 December 2022)

The ERIC Forum's aim is to advance operations of ERICs and to strategically contribute to the development of ERIC related policies. The ERIC Forum Implementation Project brought together 23 established European Research Infrastructure Consortia (ERICs) to strengthen their coordination and enhance their collaborations. The strategic approach of the ERIC Forum contributes to address critical challenges and develop best practices. The project was composed of 7 different thematic work packages, each focus-



ing on a specific area. SHARE-ERIC was leading work package 2, which aimed for a suitable governance model that fulfils the needs of the ERIC Forum and can be accepted by all the participants (ERICs). For more information, also see pp. 74–75.

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

This project strengthens the cooperation with a 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". The newest additions to the network are studies in Egypt and South Africa.

# FINAN CIAL ASPE CTS

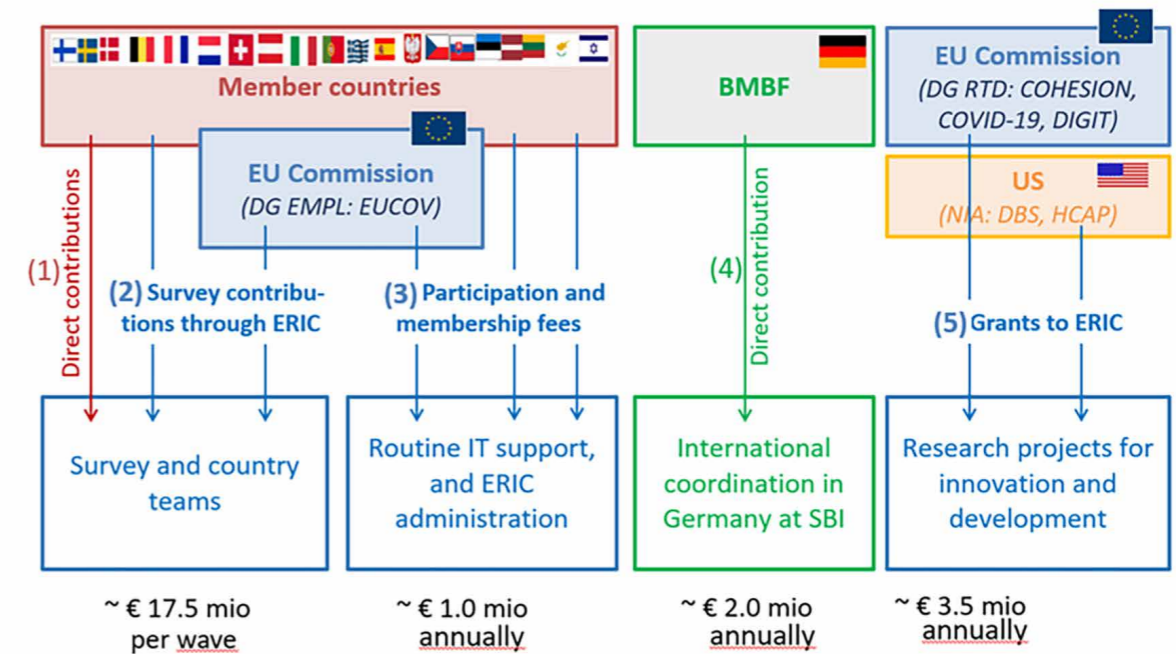
SHARE is fully financed by public funds, which are granted by national ministries/research councils, the European Commission or other public funders, such as foundations.

# FINANCIAL ASPECTS

The finances of SHARE are complex. This reflects the scientific complexity of SHARE with its basic survey and the many add-on projects that are funded from various sources. SHARE is not only a social survey but includes sophisticated (and thus expensive) measures of health. It also reflects the desire of SHARE and the European Commission to cover all EU member states in spite of large differences in the mode and ability to fund SHARE. Some countries have several funders; other countries are subsidized by Commission funds. Altogether, SHARE has over 50 different

sources of funding. The complexity is increased by the fact that 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 1 gives a schematic overview of the monetary flows in SHARE.

Figure 1: Monetary flows of funds in SHARE (as of Wave 8)



The largest expenditure item in SHARE are the costs of the survey and the country teams (about €17.5m annually, based on 2022 prices). 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 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 participation fee. In some countries, DG EMPL pays this fee. It amounts to about €750k annually. In addition, the membership fee covers the financial and legal administration of the SHARE-ERIC, about €250k annually.

The international coordination of SHARE takes place at the newly founded SHARE Berlin Institute (SBI) in Germany and is funded by the German Ministry of Research and Education (BMBF). Costs are about €2.0m annually and are covered directly by the BMBF without an involvement of the ERIC.

Finally, the SHARE-ERIC receives grants for specific purposes in research, innovation and development. 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 “COHESION”. Another ex-

ample is the coverage of the COVID-19 pandemic that has been funded by DG RTD’s project grant named “SHARE-COVID19”. A third project grant named “SurveyDigit” that has been submitted together with the ESS and should fund the further digitization of SHARE is currently under review. SHARE also receives project grants from the US National Institute on Aging. This funds the collection and analysis of dried blood spots (DBS) and the measurement of cognitive decline and dementia (HCAP). Altogether, these project grants are currently about €3.5m.

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

1. Contributions by most member countries and 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 new Annex 3 in the revised SHARE-ERIC Statutes and is displayed in Figure 2.

Figure 2: Schematic profit and loss statement of the SHARE-ERIC

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

## FINANCIAL REPORT FOR SHARE-ERIC 2022

Figure 3 presents the profit/loss statement for the previous year 2022. It is structured according to Figure 2.

### 1. Survey contributions

SHARE receives survey contributions from the member countries, from DG EMPL. In 2022, we also dissolved overheads from US NIA that were earmarked for SHARE-ERIC, and a large carry-over surplus from 2021. 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 shift in the survey schedule, survey expenditures in 2022 were smaller than these survey contributions, leaving a surplus of about €2.6m, most of which will be spent in 2023, see the Annual Spending Plan for 2023 in Figure 4.

### 2. Membership and participation fees

All member countries except two have paid their 2022 membership fees as of 23rd April 2023. 20 countries paid their participation fees according to

the fee schedule that was established in 2019. DG EMPL pays the participation fee for the remaining 8 countries. Total fee income in 2022 was about €791k.

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 €638k, such that the year 2022 ended with a surplus of about €153k.

### 3. Grants

SHARE-ERIC is the beneficiary for four major grants. DG EMPL supported the international coordination at MPG 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, and the administration of the telephone interviews during the pandemic with the "SHARE-COVID19" grant. The US National Institute for Aging supported the measurement of cognitive decline and dementia with the "HCAP" grant. Together, grant income was about €3.3m, which was spent almost exactly with a very small carry-over of about €230 to 2023.



Figure 3: Profit/Loss Statement for 2022

1. Survey contributions from countries and DG EMPL			
Country	Income 2022	From country	From DG EMPL
AT		619.170,00 €	- €
BE*	* direct contribution	- €	- €
CZ		256.700,00 €	- €
DE - via DFGTU		1.345.607,78 €	- €
FR		506.350,00 €	- €
GR		88.905,37 €	152.145,53 €
IL*		- €	- €
IT		250.000,00 €	- €
NL		258.004,00 €	- €
PL		260.078,00 €	- €
SE		472.707,57 €	- €
SI		146.520,00 €	- €
CH*	* direct contribution	- €	- €
BG own/via DG EMPL		24.475,00 €	31.351,80 €
Cy via DG EMPL		- €	30.805,46 €
DK*	* direct contribution	- €	- €
EE own/partially via DG EMPL RF		67.748,00 €	283.676,00 €
ES own/partially via DG EMPL		- €	125.697,02 €
FI own/partially via DG EMPL		- €	136.743,47 €
HR		112.367,45 €	- €
HU		108.375,00 €	- €
LT via DG EMPL		23.820,00 €	194.775,84 €
LV via DG EMPL		170.000,00 €	38.619,36 €
LUX*	* direct contribution	- €	- €
MT via DG EMPL		- €	118.891,64 €
PT*	* direct contribution	- €	219.324,41 €
SK via DG EMPL		- €	115.691,80 €
RO via DG EMPL		- €	107.045,68 €
Dissolved overheads from NIA at Max Planck			79.960,00 €
Carry-over Surplus 2021			1.521.880,89 €
<b>Totals</b>		<b>4.710.825,17 €</b>	<b>1.554.768,01 €</b>
<b>Total income</b>		<b>4.710.825,17 €</b>	<b>7.867.434,07 €</b>

Expenditures 2022		Amount
Country		
AT		332.923,87 €
BE*		- €
CZ		217.204,00 €
DE - via DFGTU		1.345.607,78 €
FR		506.350,00 €
GR		69.848,00 €
IL*		- €
IT		141.625,00 €
NL		258.004,00 €
PL		147.575,00 €
SE		649.194,32 €
SI		201.565,00 €
CH*		- €
BG		62.517,00 €
CY		54.491,00 €
DK*		- €
EE		113.157,00 €
ES		267.002,51 €
FI		157.880,30 €
HR		112.367,45 €
HU		36.125,00 €
LT		194.775,84 €
LV		26.882,66 €
LUX*		- €
MT		88.239,84 €
PT*		92.528,00 €
SK		115.691,80 €
RO		107.045,68 €
<b>Total expenditures</b>		<b>5.298.598,05 €</b>
<b>Balance</b>		<b>2.568.836,02 €</b>

2. Membership and participation fees			
Country	Income 2022	Participation fee	DG EMPL
AT	Membership fee	15.000,00 €	-
BE		10.000,00 €	-
BG		10.000,00 €	-
CH*	* not member	10.050,00 €	-
CY	not paid	19.950,00 €	10.050,00 €
CZ		10.050,00 €	-
DE		19.950,00 €	-
DK*	* not member	15.000,00 €	-
EE*	* not member	10.050,00 €	-
ES*	* not member	19.950,00 €	-
FR		19.950,00 €	-
GR	not paid	10.050,00 €	10.050,00 €
HR		10.050,00 €	-
HU		10.050,00 €	-
IL		15.000,00 €	-
IT		19.950,00 €	-
LV*	* not member	10.000,00 €	10.050,00 €
LT*	* not member	15.000,00 €	10.050,00 €
LU*	* not member	19.950,00 €	10.050,00 €
MT*	* not member	10.000,00 €	10.050,00 €
NL		19.950,00 €	-
PL		10.050,00 €	-
PT*	* not member	10.050,00 €	10.050,00 €
RO*	* not member	10.050,00 €	10.050,00 €
SE		19.950,00 €	-
SI		10.050,00 €	-
SK*	* not member	10.050,00 €	10.050,00 €
Carry-over Surplus 2021		265.591,00 €	-
<b>Totals</b>		<b>405.591,00 €</b>	<b>80.400,00 €</b>
<b>Total income</b>		<b>790.941,00 €</b>	<b>790.941,00 €</b>

Expenditures 2022		Amount
Cost item		
<b>ERIC administration</b>		
Account charges/transaction fees		1.016,68 €
Safekeeping charges/negative interest (until abrogated)		17.594,38 €
Auditor		4.875,00 €
Budget SMB/Travel		57.857,49 €
1 FTE accountant		78.176,92 €
Council meeting		4.791,39 €
ESFRI Workshop, travel and subsistence		- €
Internet domains SHARE		1.501,15 €
Design and Print annual activity report		6.700,00 €
Website relaunch		15.760,80 €
MEA-SHARE GmbH operational costs 2021		2.532,36 €
Bundesanzeiger Transparency Register		- €
<b>Total</b>		<b>190.806,17 €</b>
<b>Routine IT services</b>		
IT routine support: CentERdata Tilburg		442.180,00 €
Data protection company for agency checks		5.120,72 €
<b>Total</b>		<b>447.300,72 €</b>
<b>Total expenditures</b>		<b>638.106,89 €</b>
<b>Balance</b>		<b>152.834,11 €</b>

3. Grants			
Name	Income 2022	NIA	DG EMPL
EUCOV	DG RTD	NIA	120.000,00 €
COHESION			
	1.240.858,00 €		
COVID-19			
	1.613.905,42 €		
HCAP			
		315.300,00 €	
<b>Totals</b>		<b>315.300,00 €</b>	<b>120.000,00 €</b>
<b>Total income</b>		<b>2.854.763,42 €</b>	<b>3.290.063,42 €</b>
<b>Balance</b>			<b>229,49 €</b>

Expenditures 2022		Amount
Country		
Staff at MPISOC for survey coordination new countries		119.767,51 €
IT support innovation: CentERdata		131.954,00 €
Economics Area: Padua		150.681,00 €
Economics Area: Venice		150.681,00 €
Health Area: Odense		206.120,00 €
Social Area: Jerusalem		113.409,00 €
Survey Migrant/Methodology: Paris		85.265,00 €
Health Care Area: Wuppertal/MPISOC		99.185,00 €
SHARE-ERIC Admin: Madrid		12.697,00 €
SHARE-ERIC subcontracts (weights, imputations, PR, Meetings)		92.500,00 €
Area Coordination, MPISOC, Munich		198.369,00 €
Staff at MPISOC for economic analyses		189.106,59 €
SHARE-COVID, all other partners		1.424.798,85 €
HCAP Fieldwork		315.300,00 €
<b>Total expenditures</b>		<b>3.289.833,92 €</b>
<b>Balance</b>		<b>229,49 €</b>

## SPENDING PLAN FOR SHARE-ERIC 2023

Figure 4 presents the expected profits and losses for the year 2023. It is structured exactly the same way as Figures 2 and 3.

### 1. Survey contributions

In 2023, SHARE will receive only a few survey contributions from the member countries and from DG EMPL since most contributions have been paid in 2022, which is reflected in the large carry-over surplus from 2022. Some countries already paid contributions towards Wave 10. Total contribution income including the carry-over is about €3.5m.

Except for the early contributions towards Wave 10, all of this will be spent for the completion of Wave 9 in 2023, totaling about €3.1m.

### 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. 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; the long-term plan will abolish the membership

fee and treat all participating countries equally, whether ERIC members or not).

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 8 countries. However, the budget of this grant is smaller than expected, which creates a shortfall in the fee income. Total fee income in 2023 is expected to be about €898k, including a carry-over of €153k from 2022.

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 €934k. We will therefore face a deficit of about €37k. This deficit was already announced during the Council meeting in November 2022. We will negotiate with Commission services to cover the shortfall.

### 3. Grants

The annual grant income for innovation and scientific development in 2023 will be larger than in 2022 mainly because we will pay for the data collection of the HCAP project. Total grant income will be about €3.9m. Expenditures for these grant projects will exactly exhaust this income.



Figure 4: Expected Profit/Loss Statement for 2023

1. Survey contributions from countries and DG EMPL			
Country	Income 2023		Amount
	From country	From DG EMPL	
AT	242.879,88 €	- €	480.527,88 €
BE*	* direct contribution	- €	- €
CZ	- €	- €	176.336,00 €
DE - via DFGTU	- €	- €	- €
FR	262.568,36 €	- €	262.568,36 €
GR	- €	- €	177.550,00 €
IL*	- €	- €	- €
IT	- €	- €	412.897,09 €
NL	104.361,24 €	- €	104.361,24 €
PL	118.279,35 €	- €	118.279,35 €
SE	- €	- €	- €
SI	- €	- €	150.446,36 €
BG	- €	- €	20.744,80 €
CH*	- €	- €	- €
CY	- €	20.000,00 €	12.924,00 €
DK*	- €	- €	- €
EE	- €	- €	293.016,81 €
ES	- €	- €	117.654,84 €
ES	- €	- €	143.566,36 €
FI	- €	- €	196.428,80 €
HR	196.428,80 €	- €	102.760,76 €
HU	- €	- €	- €
LT	- €	- €	- €
LV	- €	- €	128.460,86 €
LUX*	- €	- €	- €
MT	- €	- €	30.651,80 €
PT*	- €	- €	166.448,46 €
SK	- €	- €	- €
RO	- €	22.000,00 €	- €
Carry-over Surplus 2022	2.568.836,02 €	- €	- €
<b>Totals</b>	<b>2.568.836,02 €</b>	<b>924.517,63 €</b>	<b>3.095.623,77 €</b>
<b>Total income</b>			<b>439.729,88 €</b>

Expenditures 2023		Amount
Country		
AT		480.527,88 €
BE*		- €
CZ		176.336,00 €
DE - via DFGTU		- €
FR		262.568,36 €
GR		177.550,00 €
IL*		- €
IT		412.897,09 €
NL		104.361,24 €
PL		118.279,35 €
SE		- €
SI		150.446,36 €
BG		20.744,80 €
CH*		- €
CY		12.924,00 €
DK*		- €
EE		293.016,81 €
ES		117.654,84 €
ES		143.566,36 €
FI		196.428,80 €
HR		102.760,76 €
HU		- €
LT		- €
LV		128.460,86 €
LUX*		- €
MT		30.651,80 €
PT*		166.448,46 €
SK		- €
RO		- €
<b>Total expenditures</b>		<b>3.095.623,77 €</b>
<b>Balance</b>		<b>439.729,88 €</b>

2. Membership and participation fees

Income 2023			
Country	Membership fee	Participation fee	DG EMPL
AT	5.000,00 €	28.500,00 €	- €
BE	5.000,00 €	38.000,00 €	- €
BG	5.000,00 €	19.000,00 €	- €
CH*	* not member	38.000,00 €	11.306,25 €
CZ	5.000,00 €	19.000,00 €	- €
DE	5.000,00 €	38.000,00 €	- €
DK*	* not member	28.500,00 €	- €
EE*	* not member	19.000,00 €	- €
ES*	* not member	38.000,00 €	- €
FI*	* not member	28.500,00 €	- €
FR	5.000,00 €	38.000,00 €	- €
GR	5.000,00 €	19.000,00 €	11.306,25 €
HR	5.000,00 €	19.000,00 €	- €
HU	5.000,00 €	28.500,00 €	- €
IL	5.000,00 €	38.000,00 €	- €
IT	5.000,00 €	38.000,00 €	- €
LV*	* not member	- €	11.306,25 €
LU*	* not member	- €	11.306,25 €
MT*	* not member	- €	11.306,25 €
NL	5.000,00 €	38.000,00 €	- €
PL	5.000,00 €	19.000,00 €	- €
PT*	* not member	- €	11.306,25 €
RO*	* not member	- €	11.306,25 €
SE	5.000,00 €	38.000,00 €	- €
SI	5.000,00 €	19.000,00 €	- €
SK*	* not member	- €	11.306,25 €
Carry-over Surplus 2022	152.894,11 €	- €	- €
<b>Totals</b>	<b>227.834,11 €</b>	<b>579.500,00 €</b>	<b>90.450,00 €</b>
<b>Total income</b>			<b>897.784,11 €</b>

Expenditures 2023		Amount
Cost item		
<b>ERIC administration</b>		
Account charges/transaction fees		500,00 €
Auditor		5.000,00 €
Budget SMB/Travel		30.000,00 €
20% SHARE-ERIC Managing Director		43.000,00 €
20% Head of Finance		16.500,00 €
1 FTE Accountant ERIC		82.000,00 €
1 FTE Project Manager		82.000,00 €
Council meeting		5.000,00 €
ESFRI Workshops, travel and subsistence		1.000,00 €
Internet domains SHARE		1.500,00 €
Design and Print annual activity report		8.000,00 €
Website relaunch		30.000,00 €
Bundesanzeiger, Transparency Register		13,00 €
<b>Total</b>		<b>304.500,00 €</b>
<b>Routine IT services</b>		
IT routine support: CentERdata Tilburg		535.000,00 €
Data protection company for agency checks		95.000,00 €
<b>Total</b>		<b>630.000,00 €</b>
<b>Total expenditures</b>		<b>934.500,00 €</b>
<b>Balance</b>		<b>- 36.715,89 €</b>

3. Grants

Income 2023			
Name	DG RTD	N/A	DG EMPL
EUCOVID II			201.600,00 €
COHESION	930.643,50 €		- €
COVID-19	1.613.905,42 €		- €
HCAP		1.175.440,57 €	- €
Carry-over Surplus 2022	229,49 €	- €	- €
<b>Totals</b>	<b>2.544.778,41 €</b>	<b>1.175.440,57 €</b>	<b>201.600,00 €</b>
<b>Total income</b>			<b>3.921.818,98 €</b>

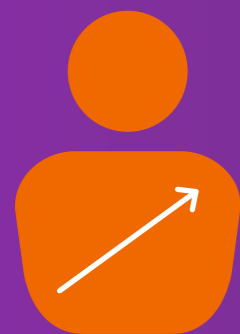
  

Expenditures 2023		Amount
Country		
Staff at SBI for survey coordination new countries		201.600,00 €
IT support innovation: CentERdata		53.546,00 €
Economics Area: Padua		113.010,75 €
Economics Area: Venice		113.010,75 €
Health Area: Odense		75.654,00 €
Social Area: Jerusalem		135.785,14 €
Survey Mgmtment/Methodology: Paris		63.948,56 €
Health Care Area: Wuppertal/MPISOC		- €
SHARE-ERIC Admin: Madrid		9.522,56 €
SHARE-ERIC subcontracts (weights, imputations, PR, Meetings)		17.206,00 €
Area Coordination, SBI		348.959,73 €
SHARE-COVID at SBI, ERIN and other partners		1.614.134,91 €
Remaining payment for HCAP survey		1.175.440,57 €
<b>Total expenditures</b>		<b>3.921.818,97 €</b>
<b>Balance</b>		<b>0,00 €</b>

# SHARE IN NUMBERS

# FACTS & NUMBERS

## Number of Registered Users



**13,857**  
in year 2021

**16,129**  
in year 2022

2021: **560**  
2022: **570**

Processed   
User Requests

## User Workshops

2021: **20**  
2022: **27**



## User Countries

2021: **76**    2022: **81**



## Publications

2021: **3,380**  
2022: **3,740**

## SSCI-ranked Publications

2021: **1,186**  
2022: **1,316**



**100%**

100% of our own  
Publications are pub-  
lished 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



2021: **594**

2022: **630**



## Website Visitors

2021: **96,500**  
2022: **97,400**

## Global Sister Surveys:

**18**



## Social Media Followers



### Twitter

2021: 1,502  
2022: 1,716



### Facebook

2021: 964  
2022: 979



### LinkedIn

2022: 166



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, CSP

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

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

## ROMANIA

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

## SLOVAKIA

University of Economics in Bratislava, Bratislava

## SPAIN

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

## SWITZERLAND

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

## VISIT YOUR COUNTRY TEAM ONLINE:

<b>Austria</b>	<a href="http://www.share-eric.eu/at">www.share-eric.eu/at</a>
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Sponsored by



This project has received funding from the European Union under grant agreements No 101052589 and the European Union's Horizon 2020 research and innovation programme under grant agreements No 870628, No 823782, No 823798, No 101015924.

