



# 2016

ANNUAL ACTIVITY REPORT



 **SHARE** **ERIC**  
SURVEY OF HEALTH, AGEING  
AND RETIREMENT IN EUROPE





**SHARE-ERIC**

Amalienstr. 33  
80799 Munich  
Germany  
info@share-project.org

**Host institution:**

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

**Editorial Board:**

Axel Börsch-Supan, Kathrin Axt, Philipp Beck, Michael Bergmann, Verena Coscia, Julie Korbmacher, Frederic Malter, Andrea Oepen, Annette Scherpenzeel, Daniel Schmidutz, Luzia Weiss

**Managing Editor:**

Andrea Oepen, SHARE European Relations and International Management

**Conceptual Design & Layout:**

Valentum Kommunikation GmbH, Regensburg

**Copyright ©SHARE-ERIC 2017**



**SHARE**

SURVEY OF HEALTH, AGEING  
AND RETIREMENT IN EUROPE

**ERIC**

SHARE'S MISSION ..... 7  
FOREWORD FROM THE CHAIRLADY ..... 9

# SCIENTIFIC ASPECTS

**AT A GLANCE** ..... 13  
Overview of the scientific achievements in 2016

**COLLECT AND SPREAD** ..... 14  
How Wave 1-5 data is disseminated and used

**SHARE USERS IN EUROPE** ..... 18

**USER TRENDS** ..... 20

**NUMBER OF PUBLICATIONS** ..... 21

**SHARE USERS ALL OVER THE WORLD** ..... 22

**MUTUAL LEARNING** ..... 24  
How SHARE contributes to improving evidence based policy measures

**MAKING SCIENCE ACCESSIBLE TO A LARGE AUDIENCE** ..... 28  
New SHARE Findings Newsletter presents research based on SHARE data

**THE RETENTION IMPROVEMENT PROGRAM**.. 30  
Encouraging and maintaining participation of panel members

**COOPERATION WITH OTHER EUROPEAN RESEARCH INFRASTRUCTURES** ..... 32  
SHARE in the SERISS project

**SHARE IN THE RITRAIN PROJECT** ..... 34

**THE SHARE BIOMARKER PROJECT** ..... 36

**PREPARATION OF WAVE 7** ..... 37

**REFERENCES AND FURTHER READING** ..... 41

**SHARE-BASED JOURNAL PUBLICATIONS** ..... 48

# OPERATIONAL ASPECTS

<b>SHARE-ERIC COUNCIL IN MUNICH</b> .....	52
<b>SHARE EVALUATION SITE MEETING</b> .....	55
<b>WELCOME, NEW SHARE COUNTRIES</b> .....	56
New Scientific Partner Organisations	

# FINANCIAL ASPECTS

<b>FINANCIAL STATEMENT FOR 2016</b> .....	70
<b>CURRENT FUNDING SITUATION</b> .....	75

<b>SCIENTIFIC PARTNERS OF SHARE-ERIC MEMBERS</b> .....	78
<b>SCIENTIFIC PARTNERS OF SHARE</b> .....	80
<b>NEW SCIENTIFIC PARTNERS</b> .....	81

# How we age in Europe.





# SHARE'S MISSION

SHARE – the Survey of Health, Ageing and Retirement in Europe seeks to analyse the process of population ageing in depth. It is the first study to examine the different ways in which people aged 50 and older live in over 20 European countries and Israel.

Its scientific potential lies in the extensive data gathered from more than 120,000 individuals (approximately 300,000 interviews) all across Europe, covering the interplay between economic, health and social factors in shaping older people's living conditions.

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



Dr. Angelika Willms-Herget  
Chair of the SHARE-ERIC Council



# FOREWORD FROM THE CHAIRLADY

Welcome to the 5th SHARE-ERIC Annual Activity Report. The report aims at providing a detailed insight into the scientific achievements, operational activities and financial aspects of SHARE-ERIC in 2016.

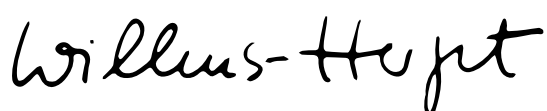
Another exciting year lies behind us: 2016 was characterized by the integration of the missing EU countries Bulgaria, Cyprus, Finland, Latvia, Lithuania, Malta and Slovakia into the SHARE study. This was a decisive step towards making SHARE a genuine European Coverage project. From a logistical point of view, this enlargement was a challenge: in particular, finding suitable partner institutions in the new countries and holding parallel training meetings for both the “old” and the “new” countries - the latter starting from scratch. The challenges, however, will be worth it: from Wave 7 onwards, SHARE will provide cross-country harmonized data on health and life circumstances from individuals of 28 countries. The process of extension of the SHARE study was accompanied by the financial support of the European Commission (DG Employment). We would like to take the opportunity to thank the EU Commission for this funding and the Country Teams of the new countries for their willingness to get involved with the “SHARE adventure”.

On its annual meeting in April 2016, the SHARE-ERIC Council has adopted the extension of SHARE from the scientific as well as from a strategic point of view: the additional engagement of DG Employment will help to stabilize the long-term funding of SHARE.

Furthermore, the SHARE-ERIC Council started the external evaluation of SHARE after the completion of Phase II in accordance with the SHARE-ERIC Statutes. A team of renowned experts from different scientific domains could be won to carry out the evaluation at the end of the year. Some keypoints of their report are quoted in this Annual Activity Report.

We are very proud about the positive outcome of the evaluation and are pleased that on this basis the next phase of SHARE can be launched.

SHARE-ERIC Chair





SHARE is an invaluable longitudinal cross-national multidisciplinary survey that has already contributed huge scientific returns and made a considerable policy impact.

- Report of the SHARE Evaluation Panel



# 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 other than scientific purposes. Any other uses, such as a commercial use of the data, are therefore excluded as matter of principle.



> 6.300



2016

# AT A GLANCE

## 2016 WAS MARKED BY AN OUTSTANDINGLY HIGH NUMBER OF MAJOR ACHIEVEMENTS

- We have expanded SHARE to all continental EU members.
- We have updated our entire database. In May 2016, SHARE Release 5.0.0 was made publicly available. It also included an update of all SHARE waves that had been conducted previously. We have increased the number of registered users from around 5.000 by the end of 2015 to more than 6.300 researchers from around the globe by the end of 2016. Read more in [“COLLECT AND SPREAD”](#) (pp. 14 - 17).
- We have redesigned our procedures to retain respondents. As for all panel surveys, retaining respondents over waves is crucial for SHARE. Therefore, in order to prevent panel attrition, we have implemented a retention improvement program which follows the latest developments in survey methodology. Read more in [“THE RETENTION IMPROVEMENT PROGRAM”](#) (pp. 30 - 31).
- We have made a quantum leap in merging socio-economic and bio-medical research. During SHARE wave 6, more than 27.000 dried blood spot (DBS) samples have been collected in twelve SHARE countries. DBS samples will be analysed for biomarkers related to diseases and conditions that are typical for older people and/or influenced by lifestyle. These blood parameters will provide objective information about the respondents' health status, complementing their subjective self-reports. Read more in [“THE SHARE BIOMARKER PROJECT”](#) (pp. 34)
- We have intensified our cooperation with other ERICs. SHARE is participating in the project “Synergies for Europe's Research Infrastructures in the Social Sciences” (SERISS), which aims to strengthen and harmonise social science research across Europe. The four-year project, which is funded by the European Union's Horizon 2020 programme, includes the three leading European Research Infrastructures in the social sciences. Read more in [“COOPERATION WITH OTHER EUROPEAN RESEARCH INFRASTRUCTURES”](#) (pp. 32 - 33).
- We have strengthened our applied research which has strong policy and socio-economic implications on national, European and international level. Examples can be found in [“MUTUAL LEARNING – HOW SHARE CONTRIBUTES TO IMPROVING EVIDENCE-BASED POLICY MEASURES”](#) (pp. 24 - 27).
- We have developed a new dissemination format: The SHARE Findings Newsletter. Every two months, it presents summaries of interesting SHARE-based publications in order to facilitate access to research results for the press, politicians, organisations and the general public. Read more in [“MAKING SCIENCE ACCESSIBLE TO A LARGE AUDIENCE”](#) (pp. 28 - 29).
- We have continued preparations for Wave 7. The questionnaire now includes a so-called life history calendar which visualizes the respondent's life to facilitate unbiased memorization of crucial life events covered by the Wave 7 interview. Furthermore, a meeting to introduce the countries to be integrated into SHARE for Wave 7 as well as Train-The-Trainer sessions were held in Munich. Read more in [“QUESTIONNAIRE PREPARATIONS CONTINUE IN 2016”](#) (pp. 35 - 37).

# COLLECT AND SPREAD

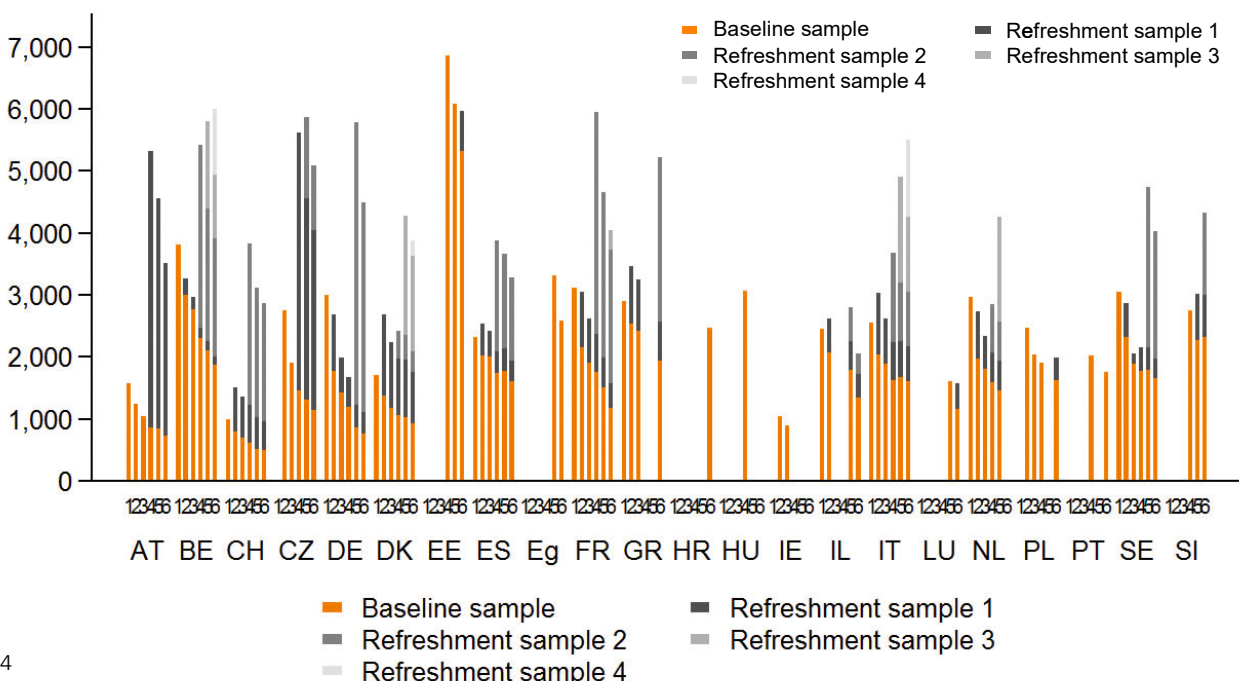
## RELEASED SHARE DATA

SHARE is a unique panel database of micro data on the health, socio-economic status and social and family networks of respondents aged 50 and older covering most of the European Union and Israel (Börsch-Supan et al. 2013). SHARE is closely harmonised with several studies worldwide, most closely with the HRS (USA), TILDA (Ireland) and ELSA (England). The network of harmonized global ageing studies also includes four Asian countries (China, Korea, Japan, and India) and three Latin American countries (Mexico, Brazil and Argentina). To date, SHARE has collected five panel waves of current living circumstances (2004, 2006, 2010, 2013, 2015) and one wave of retrospective life histories (2008, SHARELIFE); four additional waves are planned until 2024. Since the updated release of Wave 1 to 5 in May 2016, SHARE provides data which has been generated by more than 225,000 interviews in 20 countries to the scientific commu-

nity free of charge. In wave 6 Croatia has joined SHARE as the 21st country. With the public release of Wave 6 data in March 2017, the data available to the scientific community will be based on nearly 300,000 interviews administered on about 120,000 respondents. A comprehensive overview of all available data is given in the SHARE “data resource profile” which has been authored by the central coordination team and published in April 2013 open access by the International Journal of Epidemiology (Börsch-Supan et al. 2013, available online via <http://ije.oxfordjournals.org/content/early/2013/06/18/ije.dyt088.short>).

Figure 01: Overview of release samples (including the forthcoming public release of March 2017)

**Figure 01** provides an update to this as it also incorporates Wave 6. On average, the sample size (including main interviews as well as End-of-Life interviews) per country is about 4000. Note that Greece had dropped from SHARE in Wave 4 due to the economic crisis. Furthermore, Portugal and Hungary did not participate in Wave 5 after



only having joined SHARE in Wave 4. Fortunately, Greece and Portugal could be recovered for participation in Wave 6, and Hungary will be recovered in Wave 7 along with eight new countries (Bulgaria, Cyprus, Finland, Lithuania, Latvia, Malta, Romania, and Slovakia).

## NEW SCIENTIFIC RELEASE 5.0.0

In May 2016, Release 5.0.0 was made publicly available including an update of all SHARE waves conducted so far. The new release is based on the latest state of data cleaning and contains several new features:

- an across waves coverscreen module
- a coding scheme for the cause of death in case a respondent deceased
- updated imputations and weights
- a unique identifier also for ineligible or non-responding household members
- SHARELIFE data for Ireland

To assure an easy and fast entry into cross-national data and high convenience while working with the data, certain variables are provided in a ready-to-be-used state for SHARE users in the so-called generated variables modules. In comparison to previous releases, several innovations were implemented for the generated variable modules of release 5.0.0, such as a coverscreen module across waves. Other new modules contain exchange rates or generated variables on social deprivation. Further innovations of release 5.0.0 are updated weights and imputations.

## ACCESS TO THE SHARE DATA

The SHARE data are distributed to registered users through the accredited SHARE Research Data Center.

Access to the data is provided free of charge to all scientists globally. Data use is subject to the SHARE Conditions of Use and national and European Union data protection laws and confidentiality rules.

In 2016, the Data Access section on the SHARE website has been restructured and updated. Besides ensuring compliance with legal requirements and ethical commitments, particular importance was placed on providing clear and transparent information to the SHARE users and website visitors. Furthermore, the release policy has been reviewed and user registration and data access procedures have been enhanced with the aim to maintain the quick and convenient access already established and improve user experience (<http://www.share-project.org/data-access.html>).

## EASYSHARE FOR TEACHING

With easySHARE, a simplified dataset for training and teaching purposes is provided by SHARE. easySHARE was updated in 2016 and since then also integrates the new data based on SHARE release 5.0.0.

In 2016, SHARE also has updated the simplified easySHARE application procedure for teaching purposes, which provides teachers with a convenient way of registering all students participating in their course/s as regular SHARE users at the same time and offers them the opportunity to directly provide the students with the data.

## RECORD LINKAGE

Furthermore SHARE strives for a linkage of its survey data to available administrative data wherever possible. A first success was achieved in Germany in 2014, when the first SHARE-linked dataset of administrative data from the German Pension Fund was made available ([www.share-project.org/special-data-sets/record-linkage-project/record-linkage-share-rv.html](http://www.share-project.org/special-data-sets/record-linkage-project/record-linkage-share-rv.html)).

The administrative data which can be linked to the survey data of German respondents are available free of charge at the research data center of the German Pension Insurance ([www.fdz-rv.de](http://www.fdz-rv.de)).

In the meantime, nine additional countries (Austria, Denmark, Estonia, Luxemburg, the Netherlands, the province Girona in Spain, Belgium, Finland and Slovenia) decided to implement record linkage with the goal of combining the national SHARE data with administrative data. However, the status quo of the implementation of the record linkage project varies a lot between the participating countries. The actual linkage is still work in progress in most of the countries as the exact procedures of how the data will be linked have to be documented and reviewed before the actual linkage is carried out. The next successful linkage is currently executed in Denmark, where Danish SHARE data is linked with health, labour market and demographic registers from Statistics Denmark and the Danish Health Data Authority. The linkage of Waves 1-5 will be completed in February 2017.

## DOCUMENTATION

Much effort has been put into documenting the innovations related to release 5.0.0. The "SHARE Release Guide 5.0.0" was published as the core overview on all aspects of the new released dataset. The release guide covers all basic information on participating countries, eligibility rules, the additional drop-off questionnaires, as well as general issues on the composition of the dataset and the different types of respondents. Furthermore, the release guide explains the treatment of missing codes and the data cleaning procedure. The document also holds all information on the additionally generated datasets. Besides this main source of information on the data, the SHARE homepage contains a continuously updated FAQ section

([www.share-project.org/data-documentation/faqs.html](http://www.share-project.org/data-documentation/faqs.html)). Additionally, all information on updates was sent to the SHARE community via e-mail newsletters ([www.share-project.org/press-news/newsletter.html](http://www.share-project.org/press-news/newsletter.html)). Moreover, tailored user support was provided by answering user questions via email or phone as well as by several user training sessions that have been offered during the reporting period.

## USER CONFERENCES



SHARE has also spent considerable time in not only providing tailored user support via e-mail and regular newsletters, but also on efforts to stay in close contact with the users and learn about their ongoing research. In addition to our SHARE working paper series, we organise regular international user conferences and user workshops. During 2016, six user workshops have been organised by the local country teams of Sweden, Girona, Switzerland, Latvia, Denmark, and Germany. The workshops provided new SHARE users with deep insights into the work with the data as well as hands on training.





The existing body of data is a major capital resource that can be exploited for added value by researchers across the world.

- Report of the SHARE Evaluation Panel



There are clear potential benefits for the European Commission in having comparable data across all 26 continental EU member states.

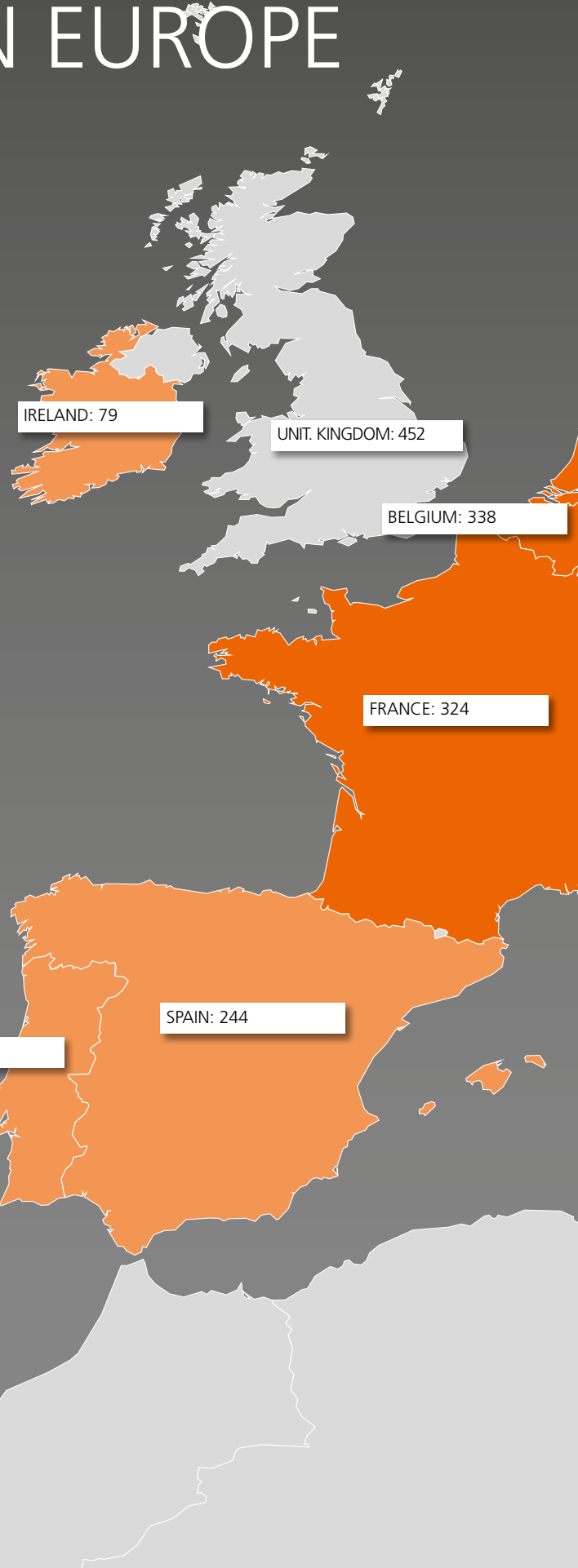
- Report of the SHARE Evaluation Panel








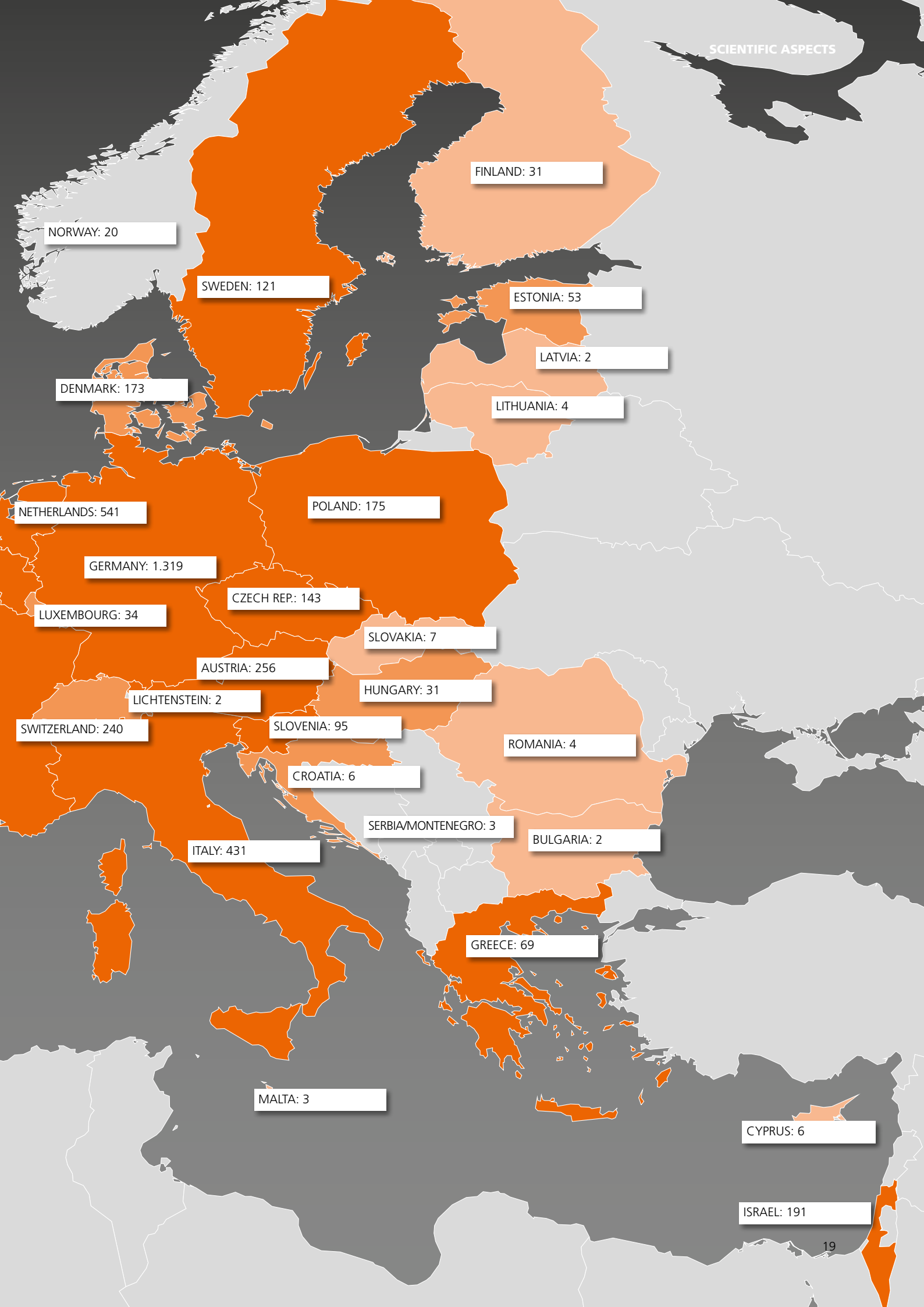
# SHARE USERS IN EUROPE

Number of users per country



## Colour coding

-  SHARE-ERIC countries
-  SHARE countries
-  upcoming SHARE countries



# USER TRENDS

By December 2016, SHARE has more than 6,300 officially registered data users from all over the world (Fig. 01). The increase in user registrations has been more than proportional from the outset: the number of new registrations per year increased to more than 1,200 in 2016 (Fig. 02). Each new wave is more valuable to the users than the previous waves. This has a scientific reason since ageing needs to be studied in its development over time. Most of the users are from European countries, but there is also an increase in users from the US and other countries worldwide which shows the value of the comparability of SHARE data with other international ageing surveys, such as HRS in the US, ELSA in the UK, and others.

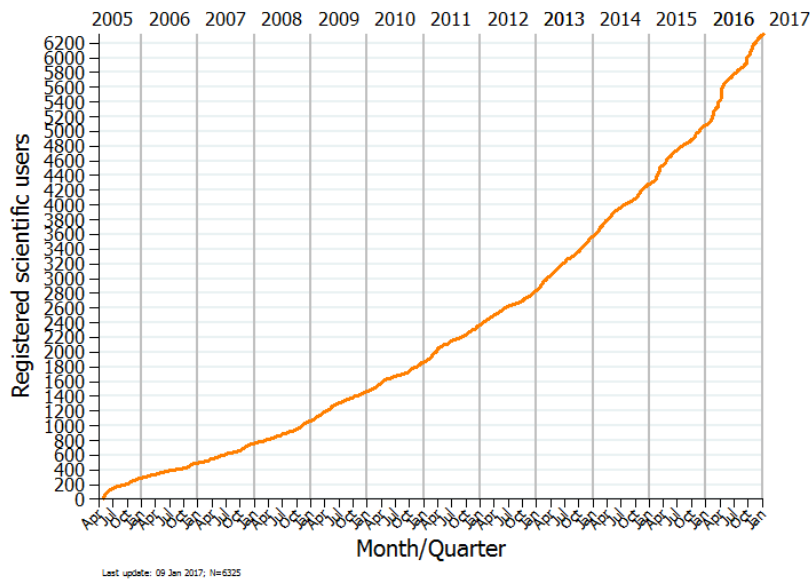


Figure 01: Officially registered data users

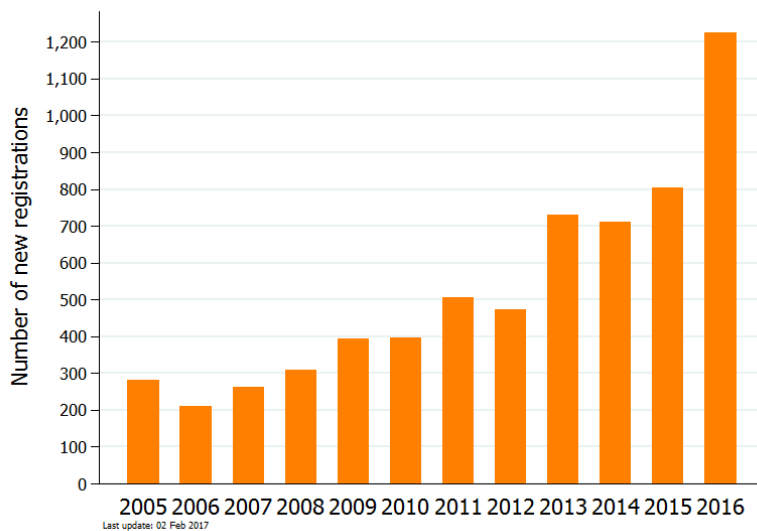


Figure 02: New SHARE users per year

# NUMBER OF PUBLICATIONS

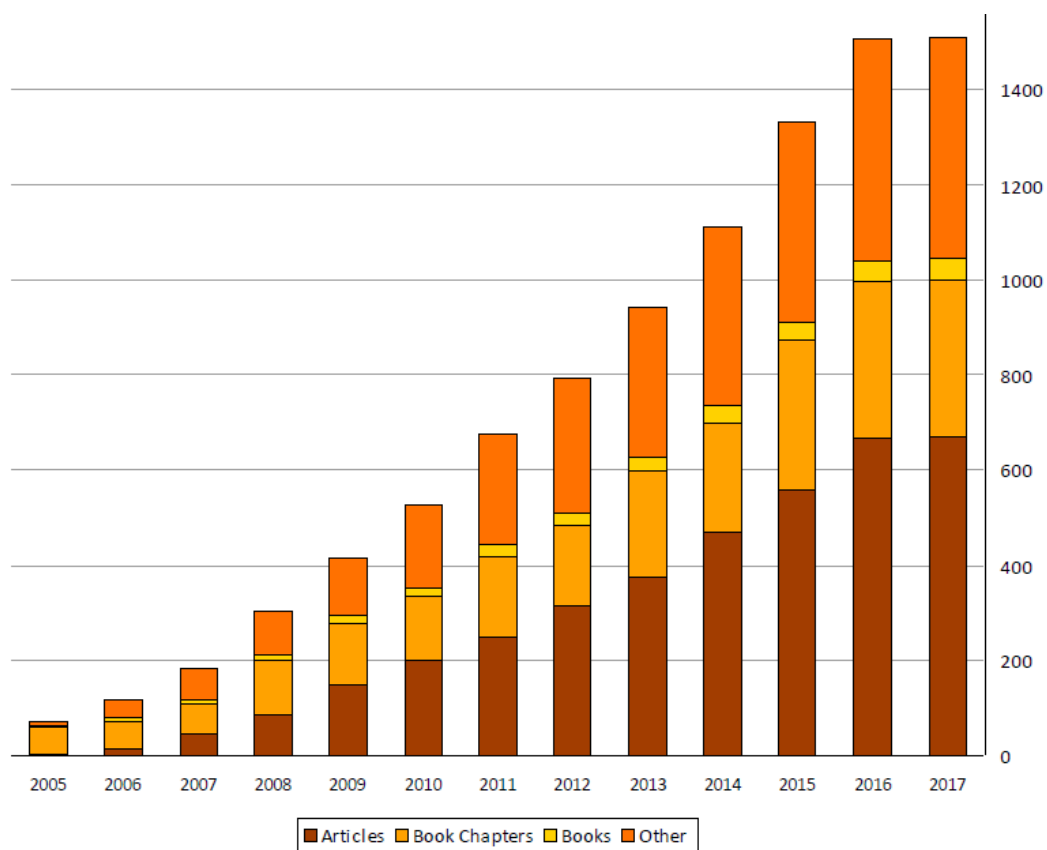
In accordance with the growing user community, the number of publications based on the SHARE data increased more than linearly amounting to more than 1500 publications overall by the end of 2016. The majority of publications are articles in scientific journals, including about 500 Social Science Citation Index ranked articles (Fig. 03). The second frequent type (“Other”) mainly comprises Working Papers, but also Theses or Policy Papers. Note that all publication numbers displayed depend on researchers reporting their publications. As, unfortunately, this may not always be the case even though we regularly encourage all users to report new publications by means of newsletters, e-mails, and our website, the reported number of publications is probably an underestimate.

An overview of all SHARE based publications is available on our website: [www.share-project.org/publications.html](http://www.share-project.org/publications.html).

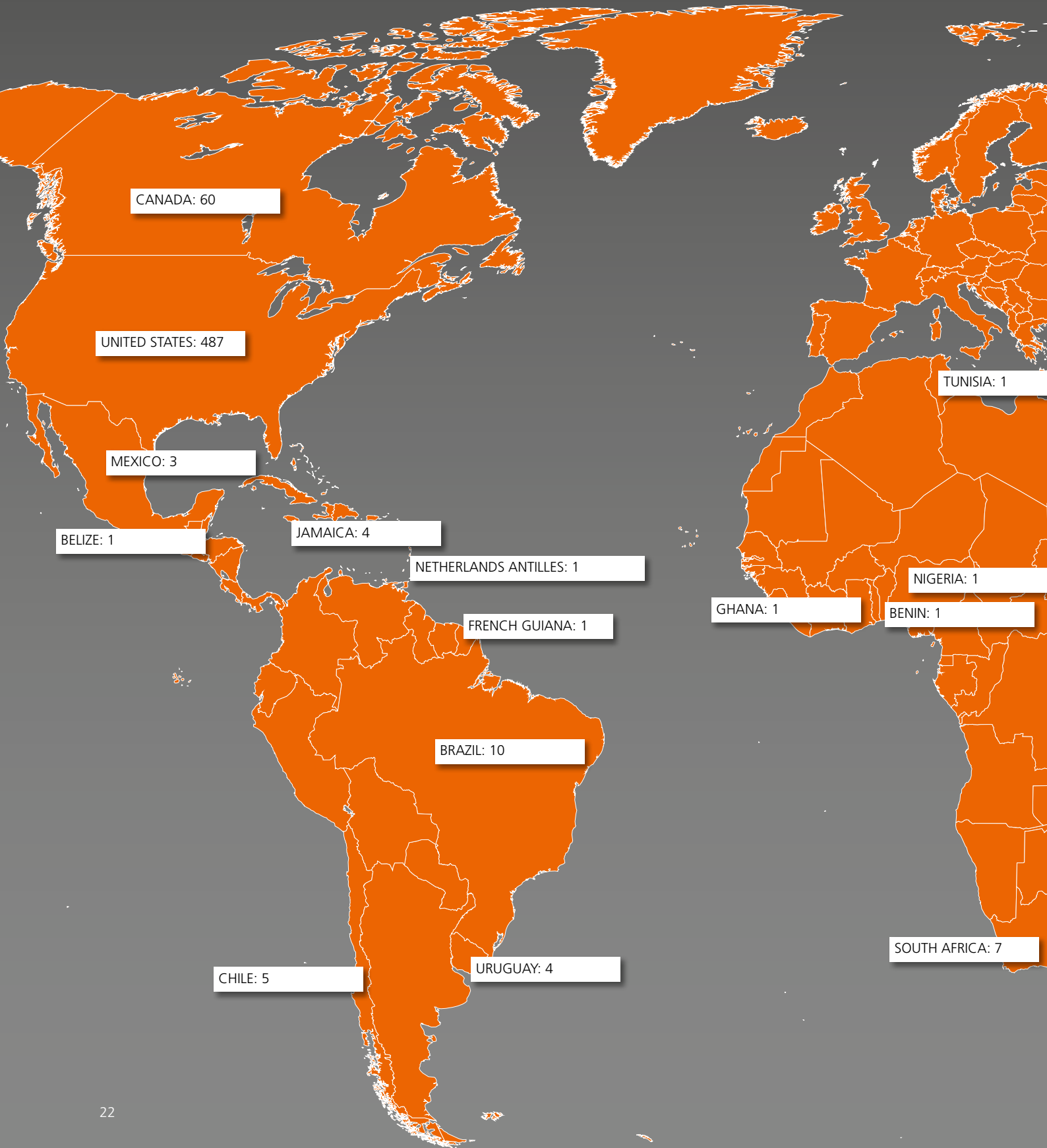
A selection of the most recent publications is given later in this report.

The selection includes all English language publications in refereed journals. Many additional publications have appeared in edited volumes or have been written in other languages. It provides a good impression of the breadth of the inter- and multi-disciplinary scientific work that has become possible thanks to the SHARE data.

**Figure 03:** Publications using SHARE data by year and publication type (January 2017)



# SHARE USERS



# ALL OVER THE WORLD



# MUTUAL LEARNING

## HOW SHARE CONTRIBUTES TO IMPROVING EVIDENCE BASED POLICY MEASURES

Population ageing is among the most pressing global challenges of the 21st century. It affects current pension systems in European countries which are unsustainable, increases the costs of health care and puts intergenerational cohesion to the test. Altogether, the ageing of European societies leads to an unprecedented situation. In order to cope with these circumstances, EU wide collaboration is essential. In 2016, SHARE expanded in a unique way: The European Commission paved the way to include eight new countries in the survey, because SHARE is an important source of evidence which helps to better cope with the challenges in the health, employment and social sector. The extension of SHARE was a milestone for future SHARE based recommendations on evidence based policy making. Mutual learning will be improved intensely through this extension.

Thanks to the integration of the new countries in 2016, pan-European research with SHARE data will be able to include 28 countries and thus bringing cross-country comparisons to an even more outstanding level. The European Commissioner for Health & Food Safety Vytenis Andriukaitis emphasized: "Europe is turning increasingly silver and it looks like this trend will continue in the decades to come. In order to tackle the challenges of ageing societies, it is important to learn from each other. Our aim is to strengthen country-specific and cross-country evidence to facilitate dialogue and policy action. The SHARE study makes an important contribution to this purpose."

Especially in the health sector, ageing has strong effects that have to be managed. In March 2016 Commissioner Andriukaitis said at a SHARE Meeting in Lithuania: "The results of this initiative for the Survey of Health, Ageing and Retirement in Europe will no doubt contribute to our collective heritage to better design and manage the health systems of tomorrow". He stated that SHARE data and the analyses based upon them are an important source of evidence which helps the ageing countries to better cope with the urgent health challenges.<sup>1</sup>

Ruth Paserman, Deputy Head of the Cabinet of Marianne Thyssen, European Commissioner for Employment, Social Affairs, Skills and Labour Mobility also pointed out the benefits of SHARE: "It is a great success that many more countries now participate in SHARE. Researching the ageing societies in all EU member states is absolutely necessary for mutual learning. SHARE will help us deliver reforms aimed at extending working lives and making social protection systems sustainable in our ageing societies."

How SHARE concretely helped to better design public policy measures in 2016 is documented in a selection of current examples.

<sup>1</sup> Read whole speech of the Commissioner:  
[http://ec.europa.eu/commission/2014-2019/andriukaitis/announcements/healthy-ageing-share-eric-conference-vilnius-17-march-2016\\_en](http://ec.europa.eu/commission/2014-2019/andriukaitis/announcements/healthy-ageing-share-eric-conference-vilnius-17-march-2016_en)



## On the member state level

### ESTONIA



In Estonia, the Ministry of Social

Affairs has used SHARE data for the Green Paper on Nutrition and Physical Activity (underweight, obesity, physical activity of older people). SHARE data has been used also for the Estonian mental health state evaluation focusing on suicides (older people suicides and depression). The evaluation process was conducted by UK experts on suicide.

Additionally, the Estonian committee of older people policy (COPP) pointed out the lack of central coordination by fostering older people voluntary work in Estonia. SHARE has been the main data source which indicates the limited degree of older people engagement in voluntary work. The COPP proposal was directed to the Minister of Social Protection.

One of the main activities of the Charter of the Estonian Co-operation Assembly (Assembly) in 2016-2017 is developing a vision and triggering a societal discussion for a more contemporary pension system in Estonia (called Pension 2050). The e-book: „A look at the gray area. The first proceedings of SHARE Estonia and recommendations for elderly policy making“ (2016) has been one of the main sources for the Assembly in its Pension 2050 activity.

### ITALY



Researchers at the Centre for Economics and International Studies (CEIS) of the University of Rome Tor Vergata

developed a dynamic micro-simulation model of health status and demand for health in Europe using SHARE data, with the goal of reproducing individual behaviours in terms of healthcare choices.

The project is a joint effort of CEIS Tor Vergata together with OECD, the University of Southern California and Stanford University. It aims at understanding the patterns of future health outcomes, like what are the drivers of rising costs, what will be the potential impact on health outcomes and expenditures if different medical technologies or innovations would be introduced and what will be the short, medium and long-run effects of primary and secondary prevention policies. Read more about the project: [www.eufem.org](http://www.eufem.org).

### SLOVENIA



In Slovenia, the SHARE data have been referenced by the National Institute for Macroeconomic Analysis and Development, the institution assisting the government in determining the medium and long term objectives for its economic and social development, in its recent report “Demographic change and its economic and social consequences”<sup>2</sup>. The report provides the government with the basis for the preparation of a comprehensive response to the demographic trends in Slovenia. In particular, SHARE data have been referenced for the estimated number of people providing informal care, the degree of social inclusion and housing situation.

<sup>2</sup> The report is available at: [http://www.umar.gov.si/fileadmin/user\\_upload/sporocila\\_za\\_javnost/2016/maj/Demographic\\_change\\_IMAD\\_May\\_2016.pdf](http://www.umar.gov.si/fileadmin/user_upload/sporocila_za_javnost/2016/maj/Demographic_change_IMAD_May_2016.pdf)

## On the European Union level

### EUROPEAN COMMISSION

SHARE is an important instrument for the European Commission, especially for economic and social benchmarking exercises as part of the European Semester. The Commission is actually the single largest user of SHARE data. Three examples on the EU level may illustrate this:

#### DG ECFIN

The European Commission's Directorate-General for Economic and Financial Affairs has used SHARE data to add detail for its long-term projections of pension and health care expenditures. Such detailed data included health services utilisation, morbidity by age and years before death, and retirement propensities by age and health.



#### DG SANTE

DG for Health and Food Safety uses SHARE for their set of indicators, including the demographic and socio-economic situation (e.g., income inequality); health status (e.g. cancer incidence); health determinants (e.g., consumption of fruit); and health services (e.g. insurance coverage). SHARE was also used to compute health-adjusted life expectancies in Europe.



#### DG EMPL

SHARE works very closely with the DG for Employment, Social Affairs and Inclusion. The last report on active ageing was based on many findings from SHARE.



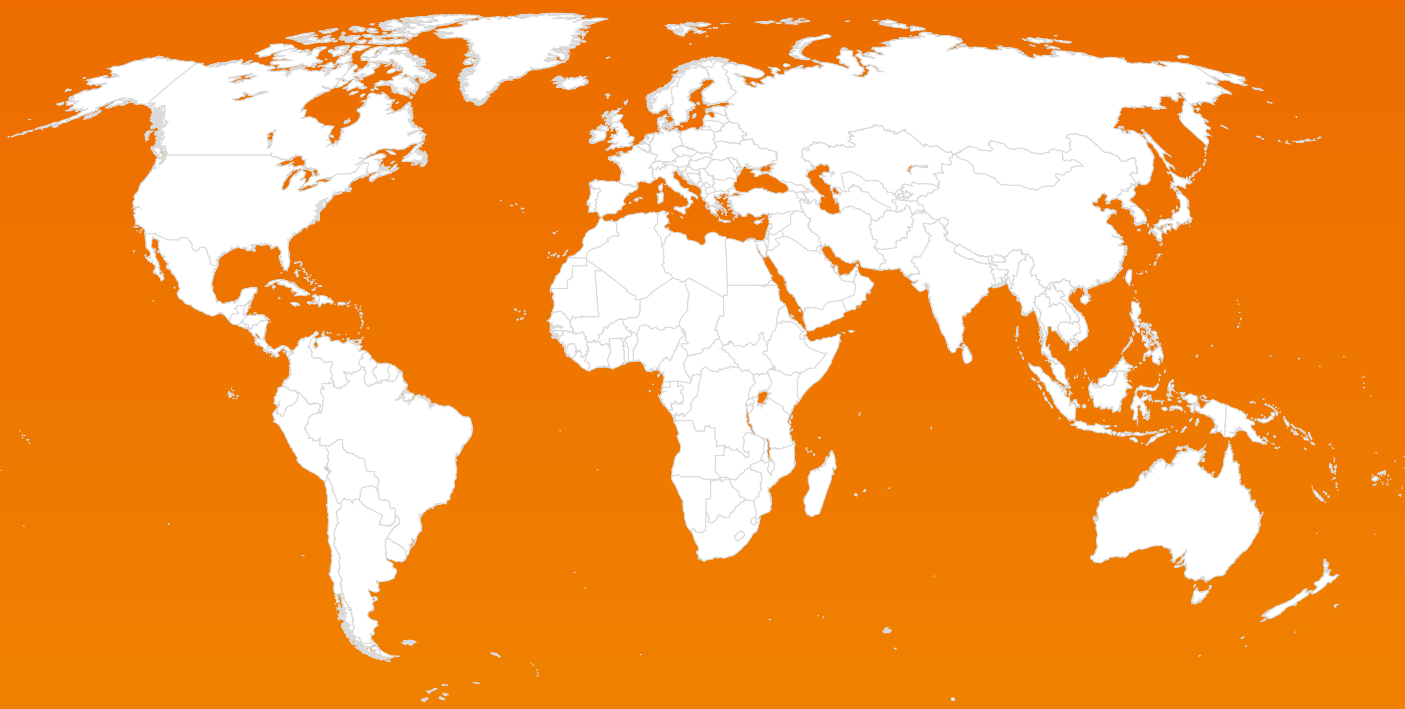
Its recent report on Employment and Social Developments in Europe stresses the importance of health prevention and work place quality to foster labour force participation at older ages. We are currently evaluating SHARE data to shed light on precarious employment histories and their implications for old-age poverty. Other topics being analysed in cooperation between SHARE and DG EMPL include

- Type and extent of work (paid and unpaid) after retirement
- Financial incentives to retire early and to select specific pathways to retirement
- Effect of work place conditions (stress, psycho-social factors,...) on early retirement and choice of pathway to retirement
- Health-related capacity to work (very detailed by age for a set of 9 EU countries, US, Canada and Japan). A simplified version could be extended to EU28.
- Health conditions to select specific pathways to retirement
- Impact of various specific health conditions (physical and mental) on retirement
- Impact of early retirement on cognition and health
- Health care utilisation after retirement
- "Social security wealth and asset holdings"

---

## On international level

---



### INTERNATIONAL ORGANISATIONS

Finally, SHARE has been intensely used by the Organisation for Economic Cooperation and Development (OECD), the World Health Organization (WHO), and the World Bank. Again, some examples may suffice: The OECD's compendium of pension policies ("Pensions at a Glance") uses SHARE data. Additionally, the report "Health at a Glance: Europe 2016. State of Health in the EU Cycle" makes use of SHARE data. This publication is collaboration between the OECD and the European

Commission under the broader „State of Health in the EU“ initiative, designed to support EU member states in their evidence-based policy making. Moreover, the WHO employs SHARE to compute healthy life expectancies. The World Bank uses SHARE data to shed more light on migration flows, e.g. between Germany and Turkey, and between France and Morocco.

A collection of policy briefs based on SHARE data can be found on our website.

# MAKING SCIENCE ACCESSIBLE TO A LARGE AUDIENCE

## NEW SHARE FINDINGS NEWSLETTER PRESENTS RESEARCH BASED ON SHARE DATA

Ageing, health and retirement are topics that play a fundamental role in everybody's life.

However, findings based on current research often do not reach the general public. They are published in professional journals, discussed by experts and presented in scientific circles and, thus, not available to the vast majority of society. For a non-scientific audience, the outcomes of such elaborate research projects as SHARE must be made accessible through specific channels. We therefore developed a new newsletter format, the "SHARE Findings Newsletter", which was introduced in December 2016. The aim is to make research results understandable for a large audience. The newsletter is written in English and presents summaries of interesting publications based on SHARE data from all over the world. The newsletter is published about every two months. The articles are also spread via Facebook and Twitter and published on our website.

### Who are the target groups of the SHARE Findings Newsletter?

The target group of this newsletter can be shortly summarized as "non-scientific audience". Our aim is to facilitate access to research results based on SHARE findings for the press, politicians, organisations and the general public. Everybody can subscribe and has access to the summaries. By breaking down important findings without using complex methodological language and scientific jargon as well as focusing strongly on the results of the studies, the articles can

be read by a non-scientific audience. Ideally, these easy-to-understand overviews will be taken up by the press, thus opening up SHARE research to an even bigger international audience.

### SHARE generates findings from many different scientific areas

The publications summarized in the newsletter are chosen from different scientific fields representing the broad range of research topics addressed by SHARE. Here are some main categories of SHARE based research:

A special focus lies on current findings about Health and Health Care. Recent studies we summarized to communicate them to a larger audience show that chronic diseases can be prevented even by less physical activity than previously assumed, or that "cognitively stimulating leisure activities" like Sudoku can help to prevent cognitive decline.

Findings from **Economy** include, for example, one current multinational study analysing why households with elderly persons are increasingly indebted in Europe.

SHARE also provides excellent data for research about **Employment**, e.g. about working conditions and depression. A further recent study sheds light on who are the people who work beyond pension age.

Another field of research is **Family Networks**: Many current studies focus on the role of grandparents in family structures. A new study also compares the chances to obtain higher education in different European countries regarding the number of siblings and gender inequality.

These are some examples of currently published articles. More SHARE based findings and all summaries can be found on our website: [www.share-eric.eu](http://www.share-eric.eu).

### Integrating researchers in communication activities

The new newsletter format provides an overview of the variety of research areas. It not only promotes the findings of SHARE data to the general public but sends a positive signal to scientists as well: By publishing summaries of their findings, the news-

letter helps researchers to make their publications more popular, rewards their efforts and strengthens their ambitions to work with SHARE data. Our voluntary obligation is to publish only articles that have been approved by the scientists of the study in advance. We want to assure that rewording the study in an easier language does not lead to misinterpretation of results. We also inform researchers, when the article of their study is released online so they can promote it (if they wish).

### How to get the SHARE Findings Newsletter?

If you want to subscribe to the SHARE Findings Newsletter, please send an email to: [info@share-project.org](mailto:info@share-project.org) with the subject: "Newsletter subscription – Findings Newsletter".



# THE RETENTION IMPROVEMENT PROGRAM

## ENCOURAGING AND MAINTAINING PARTICIPATION OF PANEL MEMBERS

As for all panel surveys, retaining respondents over waves is crucial for SHARE. To study the process of ageing and changes in health and living conditions across Europe, respondents need to be observed across multiple points in time. Moreover, panel attrition not only decreases the number of longitudinal observations but can also lead to biased estimates since some groups of respondents are more likely to drop out than others. SHARE therefore devotes much attention to the motivation of longitudinal respondents, for example implementing incentive schemes for respondents and interviewers, extensive interviewer training and monitoring, and tracing and tracking of respondents between waves. In wave six, SHARE extended these efforts to recent developments in survey methodology, which concentrate on the adaptation of fieldwork procedures to respondent characteristics. The new retention improvement program was first implemented in the SHARE Germany substudy, which serves as a testbed for the other SHARE countries. The program included:

**1. Respondent incentives:** Many studies have shown that the most effective way to increase response rates in surveys is a prepaid monetary incentive. SHARE Germany pays relatively high respondent incentives but conditional on participation. Prepaid monetary incentives are, however, controversial in Germany for legal and ethical reasons. Therefore, as a bridge between the unconditional cash incen-

tives and non-monetary gifts, we included a small gift with the advance letter. This strategy started in wave six with a postage stamp booklet including three postage stamps and continues in wave seven with a small card magnifier. For the following waves, we will include similar gifts in the advance letter and extend this strategy to other countries.

**Figure 01:** Postage stamp booklet and card magnifier used as unconditional incentives for respondents



**2. Interviewer incentives:** In close cooperation with survey agencies, several SHARE countries implement a bonus system for interviewers: They pay an extra amount on top of the normal pay per completed interview if an interviewer exceeds the target response rate. In wave six in SHARE Germany, interviewers additionally received a bonus for each interview they conducted with a person over 80 years. This strategy is part of the adaptive fieldwork design in which differential incentives and procedures are used for different target groups in the sample, adapted to the respondent characteristics.



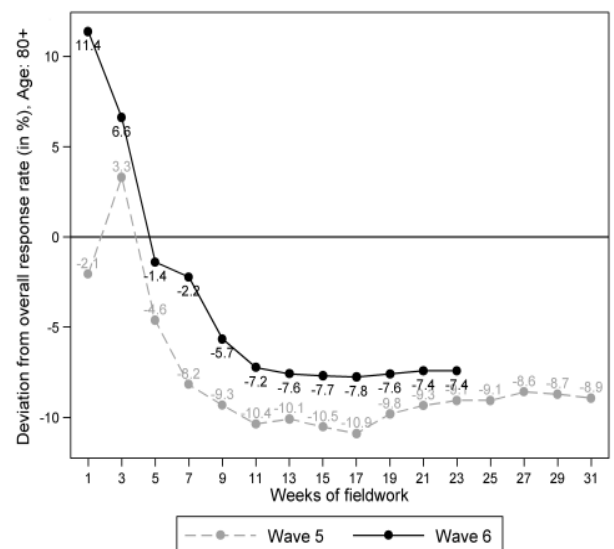
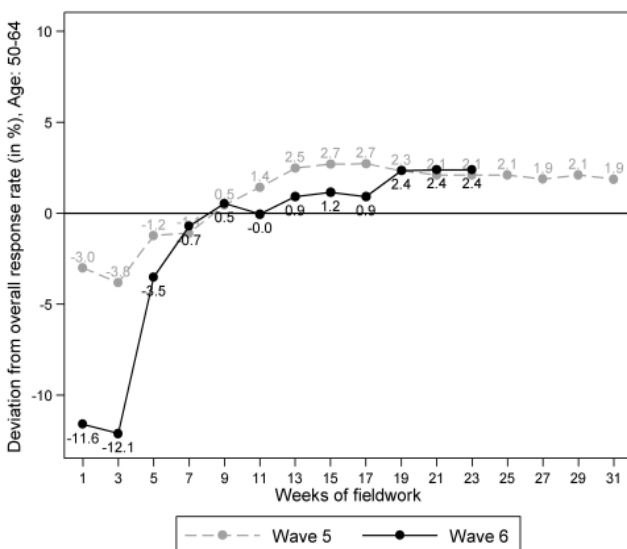
**4. Tailored communication:** A tailored communication strategy is also part of the adaptive fieldwork design. The idea behind this strategy is to use a variety of communication materials that addresses the heterogeneity of the SHARE panel members, especially its large age range. Examples are a modernized website which might especially appeal to the online generation between 50 and 65; traditional paper leaflets to better reach the older generations; a results brochure which those who are interested in science can read, and a television celebrity who might also reach those potential respondents who do not have a large personal interest in research topics. These measures might not be uniformly effective, but the assumption is that the combination of different forms of communication could stimulate response rates across different target groups, thereby in potential also reducing nonresponse bias.

**Figure 02:** A results brochure for respondents used in SHARE Germany.



**5. Responsive design:** During the fieldwork of the sixth SHARE wave in Germany, we applied a so-called “responsive fieldwork design” focusing on specific groups with known low response probabilities. This design makes use of background information to more efficiently allocate fieldwork resources to specific sample units. SHARE is especially suitable for such a strategy, because it already conducts a high level of fieldwork monitoring, has in place an advanced system to register fieldwork results, and possesses extensive information about the interviewer performance as well as the panel members and their response behavior in previous waves. We developed a “dashboard” of response probabilities for relevant respondent characteristics during the wave six fieldwork in SHARE Germany. This allowed for immediate feedback to the survey agency and focused actions with regard to specific groups of respondents, e.g. increased contact attempts in specific areas and for specific age groups (see Bergmann and Scherpenzeel, 2016, for a more detailed description).

**Figure 03:** Deviations from the overall household response rate for the youngest age group (50-64) and the oldest age group (80+): Graphs used to monitor different age groups during fieldwork.



# EUROPEAN RESEARCH INFRASTRUCTURES

## SHARE IN THE SERISS PROJECT



**Figure 01:** Synergies for Europe's Research Infrastructures in the Social Sciences

Since July 2015, SHARE is participating in the project "Synergies for Europe's Research Infrastructures in the Social Sciences" (SERISS), which aims to strengthen and harmonise social science research across Europe. The four-year project, which is funded by the European Union's Horizon 2020 research and innovation programme, involves the three leading European Research Infrastructures in the social sciences – the European Social Survey

(ESS ERIC), the Survey of Health, Ageing and Retirement in Europe (SHARE ERIC) and the Consortium of European Social Science Data Archives (CESSDA AS) – with organisations representing the Generations and Gender Programme (GGP), European Values Study (EVS) and the WageIndicator Survey. The cluster project is intended to overcome fragmentation among these infrastructures and foster interoperability, harmonisation and innovation.



**Figure 02:** Six research infrastructures participating in SERISS



Specific project objectives are:

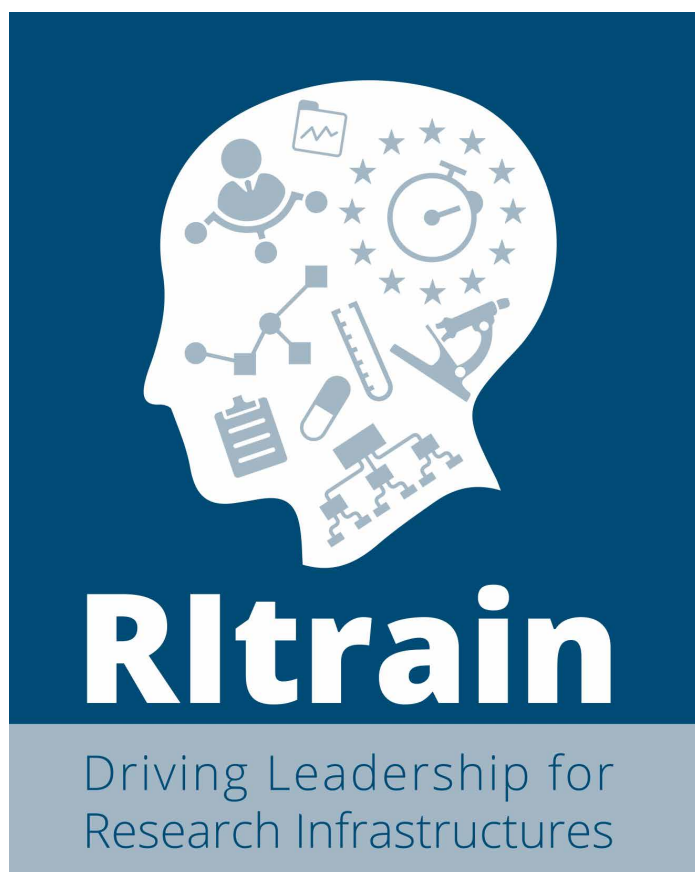
- to better represent the European population, including important target groups for policy makers such as the young unemployed, older persons in institutions and migrants;
  - to strengthen cross-national harmonisation of data and methodology across Europe by leveraging recent advances in questionnaire design, translation and coding techniques;
  - to exploit the advances in software technology for cost-effective web-based interviewing, more efficient fieldwork management, and to support new ways of collecting data;
  - to better connect the world of research driven social surveys with the world of process-generated administrative data; and
  - to ensure that the ethical and data protection concerns of respondents are properly taken into account by creating a consistent and EU-wide framework for all social surveys including new 'Big Data'.
- The Translation Management Tool developed and used by SHARE has already been adapted and tested in a few countries to carry out translations for ESS Round 8. The possibility of extending its use to more countries in ESS Round 9 (2018/19) is being explored as are the possibility of using the TMT for translation on EVS 2017 and the next wave of GGP fieldwork;
  - The CRONOS web panel being built by the ESS provides questionnaire space to SERISS partners as well as other selected cross-national surveys;
  - A full overview of all sampling frames used across studies and European countries was put together, as well as an inventory of surveys including the institutionalized population. When SHARE had to find reliable and accessible sampling frames in the eight new countries in Wave 7, the sampling frame database was used as a consultation source and SHARE thus benefited from the experience of ESS and EVS who are already active in many of these countries. The database and inventory have been made publically available to other survey infrastructures via the SERISS website;

Researchers at SHARE MPG, SHARE Padua and SHARE HUJI are actively participating in the project's work packages on representing the population; maximizing equivalence through translation; interactive tools for cross-national survey; training and dissemination; legal, ethical and quality issues of new forms of data; a survey future online; coding of socio-economical questions.

The exchange of information between the partners in SERISS have, already in the first project period, led to significant benefits not only for the participating studies but also for other cross-national social surveys in Europe. Some examples:

In conclusion, work undertaken under SERISS is contributing to the long-term development and sustainability of the research infrastructures involved. Even in the first project period, there are some clear examples of synergy and impact, to which SHARE has significantly contributed but also benefited itself.

# SHARE IN THE RITRAIN PROJECT



Since September 2015, SHARE has been participating in the project “Research Infrastructure Training Programm” (Ritrain). The mission of that project is to improve and professionalise the training of managerial and leadership staff in research infrastructures (RIs). The four-year project which is funded by the European Commission’s Horizon 2020 research and innovation programme, brings together research infrastructures from different scientific domains: BBMRI-ERIC as coordinator, EMBL-EBI, MIRRI, EATRIS-ERIC, ECRIN-ERIC, ELIXIR, DARIAH-EU, Infrafrontier, Euro-Bioimaging, ISBE and SHARE-ERIC as well as selected universities: Milano-Bicocca, Medical University of Vienna, Imperial College London, Universidade do Minho, Institute of Molecular Genetics in Prague.

The specific objective is to develop a flagship training programme which enables RIs across all domains to gain expertise on governance, organisation, financial and staff management, funding, IP, service provision and outreach in an international context.

The programme will be designed and delivered by experts who have set up and managed RIs from concept to maturity. RItrain will define competencies required by RIs through consultation with their senior managers.

The resulting competency framework will underpin a Bologna-compliant degree, the Master in Research Infrastructure Management, with three delivery routes.

Professionals working in RIs (or organisations representing them) can dip into the content, focusing on areas where there is the most demand.

Management teams can take the course as an organisation, splitting up modules between them to gain a certificate for the RI. This will flag the RI as an organisation that values staff development, improving its attractiveness as an employer.

Recent graduates and others wishing to enhance their employability can do a full master's degree. Course content will include webinars led by senior managers of RIs. A staff-exchange programme will catalyse exchange of best practices and foster cooperation to develop a mobile work force effective across many RIs. By the end of the project, RItrain will be delivering a master's curriculum funded through course fees. Others with an interest in adopting it will be encouraged to do so, thus providing a means of expanding the programme. Europe's research community and global collaborators will gain from world-class facilities to support excellent, high-impact research to benefit humankind.

# THE SHARE BIOMARKER PROJECT

During SHARE Wave 6, more than 27.000 dried blood spot (DBS) samples have been collected in twelve SHARE countries. This is a major achievement which will merge the socio-economic and bio-medical research communities in better understanding of how the main events over a life-course will affect health, social and economic outcomes in later life. The DBS samples will be analysed for biomarkers related to diseases and conditions that are typical for older people and/or influenced by lifestyle, for example cardiovascular diseases, cognitive decline, diabetes, or markers for stress. These blood parameters will provide objective information about the respondents' health status, complementing their subjective self-reports included in the SHARE questionnaire health module.

For ethical and legal reasons, only samples with available written consent will be analysed. During the first months of 2016, SHARE central worked closely together with country teams and survey agencies to assure for each DBS sample the availability of the signed consent forms and the linkability to a survey interview. This screening yielded nearly 27.000 DBS samples approved for laboratory analysis.

At the same time, we negotiated with laboratories to conduct the analyses of the biomarkers. We identified the Department of Laboratory Medicine at the University of Washington (UW) in Seattle and the laboratory at Statens Serum Institut (SSI) in Copenhagen due to their unique specialization for certain markers and their experience in handling

large numbers of DBS samples. In autumn 2016, preparations for sample analyses started. In a first step, 8000 DBS samples were randomly selected, picked from the freezers of the biobank in Odense and sent to Copenhagen. At the SSI, small discs of 3.2 mm diameter are semi-automatically punched out of the blood spot on the filter cards. Five of these discs (the punches) will be necessary from each DBS sample to perform the full set of analyses (pre-determined by SHARE and consented to by the respondents). SSI is shipping the punches (three) necessary for the analyses of HbA1c, total Hb, blood fats, CRP, and Cystatin C to the lab in Seattle, keeping the remaining two punches in Copenhagen for the analyses of cytokines and Vitamin D. In 2017, the preparatory steps of punching 8000 DBS samples will be completed and the actual analysis of the huge amount of SHARE DBS samples will start.

# QUESTIONNAIRE PREPARATIONS CONTINUE IN 2016

One key difference of Wave 7 compared to all “standard panel waves” was employing a so-called life history calendar, meant to visualize the respondent’s life to facilitate unbiased memorization of crucial life events covered by the Wave 7 interview. Figure 01 below is an illustration of the SHARE Wave 7 life history calendar which displays different dimensions of a respondent’s life history:

- respondent’s offspring,
- respondent’s partners (independent of marital status)
- accommodation history
- job tenure
- health history

The Share life history calendar spans across the respondent’s life course in years, represented by horizontal dimensions with a cell for each year of life. The graph shows how it is now possible to provide a multidimensional overview of all events that occur in a particular year. The life history calendar also facilitates navigation through the calendar, a process which is enabled by clicking on specific coloured cells corresponding to landmark events. Many adjustments to the outdated technology of Wave 3

(2008) were necessary to implement the life history grid in its full capacity.

In addition, many special challenges had to be addressed such as the flow of characters from right to left in the Israeli Hebrew instrument. At the end of 2016, SHARE Central in collaboration of the country teams had managed to finalize nearly all of the critical issues reported over the course of the year.

SHARE life interview 7.4.3\_001.TT-000391-02;1 Sec\_DN1.DN755\_introduc

Now I am going to ask you questions about things that have happened during your life.

Some of your answers will appear on the calendar on the screen.

This may help you remember when other events in your life happened.

IWER:  
Show calendar to the respondent.

1. Continue

<- Back

	Year: '36	'37	'38	'39	'40	'41	'42	'43	'44	'45	'46	'47	'48	'49	'50	'51	'52	'53
Age:	0	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17
1 Children																		
2 Partners																		
3 Accommodation																		
4 Job																		
5 Health																		

**Figure 01:** Screenshot of the SHARE Wave 7 life history calendar

## INTEGRATION OF 7 NEW COUNTRIES PROGRESSES

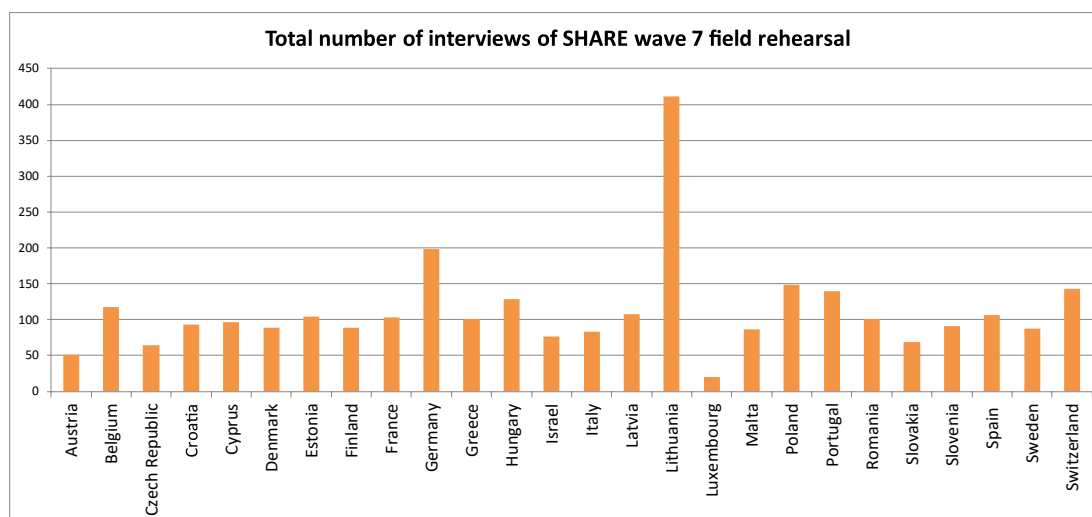
The first official meeting to introduce the member of the countries to be integrated into SHARE for Wave 7 was held in Munich in February 2016. The central coordination team provided a comprehensive overview on all aspects of the integration process and answered many questions of newly recruited country teams. On 17 March 2016 the European Commissioner for Health & Food Safety Vytenis Andriukaitis honored the work of the SHARE researchers and attended the SHARE meeting in Vilnius, Lithuania. Teams from 28 countries, the central coordination team and the scientific Monitoring Board - SHARE's scientific advisory board composed of world-class researchers - were gathered to prepared the upcoming seventh wave of cross-country harmonized data collection on health and life circumstances across Europe. The Commissioner held a keynote about the importance of exploring demographic ageing. He stressed that providing more and better data would be an important goal to build up international and country-specific knowledge.

The rest of the meeting was spent on detailed scientific discussions around the results of the first test

data collection, the so-called "Pretest" and what consequences were to be drawn for the second test run, called field rehearsal. According to the three-cycle instrument development process, the survey agencies fielded the survey instrument twice (in pretest and field rehearsal) within the report period. The pretest (fielded in spring 2016) was the most work-intensive phase regarding the development of the software and the questionnaire. At this stage, many feedback loops between country teams, survey agencies and SHARE Central were necessary in order to resolve technical and translation issues, fix questionnaire routing and filtering, and correct issues concerning specific questionnaire items.

The field rehearsal (fielded in fall 2016) took the development phase to the next level. It is the dress rehearsal for the main survey. In this phase, no more major interventions were allowed to modify the software and the questionnaire. All translation work had to be finished before fielding. The field rehearsal is meant to test all fieldwork monitoring procedures. The final number of interviews conducted during the field rehearsal can be found in Figure 6 below.

**Figure 02:** Total number of interviews by country gathered during the field rehearsal of SHARE wave 7



## TRAIN-THE-TRAINER SESSIONS OF TEST RUNS HELD IN MUNICH

In preparation of wave 7, SHARE has again successfully implemented its highly appreciated train-the-trainer (TTT) concept, in which all technical, logistical and managerial aspects of successful fieldwork were conveyed and, even more importantly, trained with hands-on experience. In 2016, separate TTTs were held for “old” and “new” country teams and the contracted survey agency, in order to keep the intensive teaching style manageable (i.e. avoiding overly crowded training sessions of 100+ attendees). A total of 4 two-day training sessions were conducted in 2016 in Munich to prepare all countries for the two test runs (pretest & fieldrehearsal). SHARE put great emphasis on multi-modal teaching methods that ensure that standardized best practices of interviewing (such as active listening and being prepared to deal with respondent reluctance) were being trained at the national level. **Figure 03** below is a photograph of a role play employed to make lead trainers aware that the “doorstep situation” – at which cooperation of a respondent is made or broken - is best trained with a role-play format.



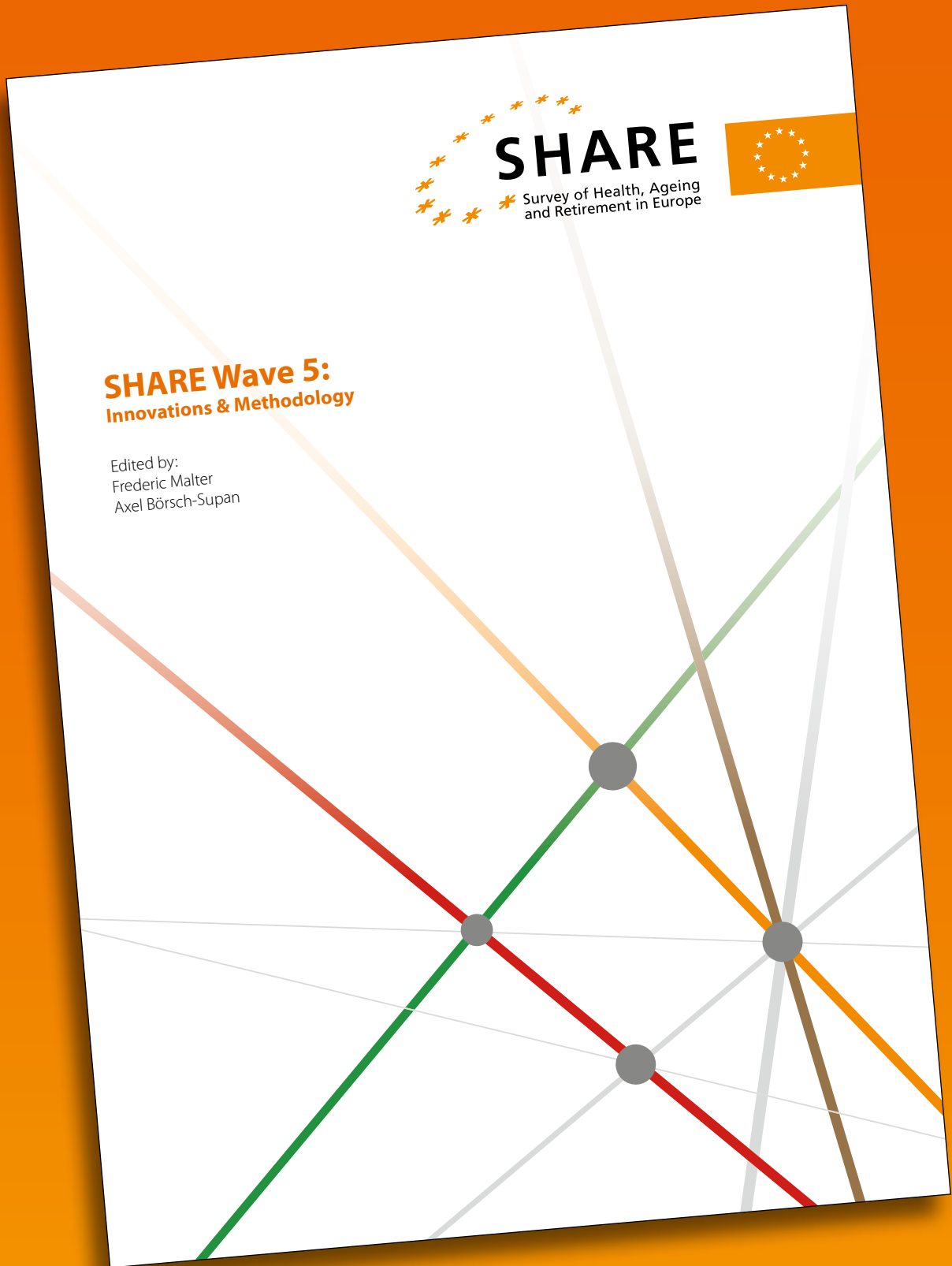
**Figure 03:** Role play of door-step situation at the TTT in Munich

Another successful format was introduced: group exercises in which attendees were asked to discuss in small groups their “best practices” to gain respondent cooperation. The results of these group exercises were then written on a flip chart and presented to the plenary.

## PREPARATION WORK FOR THE WAVE 7 DATA COLLECTION

For each test run of the new SHARE Wave 7 questionnaire, so-called preload data files were compiled for each country by the SHARE database management. The preload files contain information on all household members as well as other information from all previous waves of data collection. It is loaded into the Sample Management System (SMS) and used to determine the interview version and to steer the interview. For example, for SHARE Wave 7 it is crucial to know if a person already conducted a SHARELIFE interview in Wave 3.

Moreover, preloaded information on respondents’ children or health behaviour (e.g. smoking) is used to keep the panel interview as short as possible because it prevents the instrument from asking about details that are already known from previous interviews. Instead, in longitudinal interviews only information on changes regarding specific characteristics is collected (e.g. marital status, characteristics of children, etc.).



SHARE is at the forefront of technological development for cross-national survey operations and methodology.

- Report of the SHARE Evaluation Panel





# REFERENCES AND FURTHER READING

Börsch-Supan, A., M. Brandt, C. Hunkler, T. Kneip, J. Korbmacher, F. Malter, B. Schaan, S. Stuck, S. Zuber (2013). **Data Resource Profile: The Survey of Health, Ageing and Retirement in Europe (SHARE)**. *International Journal of Epidemiology* 42: 992-1001. DOI: 10.1093/ije/dyt088

Börsch-Supan, A. and H. Jürges (Eds.) (2005). **The Survey of Health, Ageing and Retirement in Europe – Methodology**. Mannheim: Mannheim Research Institute for the Economics of Aging (MEA).

Börsch-Supan, A., A. Brugiavini, H. Jürges, A. Kapteyn, J. Mackenbach, J. Siegrist, G. Weber (Eds.) (2008). **First results from the Survey of Health, Ageing and Retirement in Europe (2004-2007). Starting the longitudinal dimension**. Mannheim: Mannheim Research Institute for the Economics of Aging (MEA).

Schröder, M. (Ed.) (2011). **Retrospective data collection in the Survey of Health, Ageing and Retirement in Europe. SHARELIFE methodology**. Mannheim: Mannheim Research Institute for the Economics of Aging (MEA).

Malter, F. and A. Börsch-Supan (Eds.) (2013). **SHARE Wave 4: Innovations & Methodology**. Munich: MEA, Max Planck Institute for Social Law and Social Policy.

Malter, F. and A. Börsch-Supan (Eds.) (2015). **SHARE Wave 5: Innovations & Methodology**. Munich: MEA, Max Planck Institute for Social Law and Social Policy.

# SHARE-BASED JOURNAL PUBLICATIONS 2016

Achelrod, D., A. Gray, D. Preiss and B. Mihaylova (2016): **Cholesterol- and blood-pressure-lowering drug use for secondary cardiovascular prevention in 2004–2013 Europe.** *European Journal of Preventive Cardiology.*  
DOI: 10.1177/2047487316676906.

Amaya, A. E. and S. Presser (2016): **Nonresponse bias for univariate and multivariate estimates of social activities and roles.** *Public Opinion Quarterly.*  
DOI: 10.1093/poq/nfw037.

Angelini, V., B. Klijs, N. Smidt and J. Mierau (2016): **Associations between childhood parental mental health difficulties and depressive symptoms in late adulthood: the influence of life-course socioeconomic, health and lifestyle factors.** *Plos One.* DOI: 0.1371/journal.pone.0167703/journal.pone.0167703.

Arpino, B. and V. Bordone (2016): **Regular provision of grandchild care and participation in social activities.** *Review of Economics of the Household.*  
DOI: 10.1007/s11150-016-9322-4.

Barros, P. P. (2016): **Tobacco and the Health of the Portuguese Elderly: Where to Look?** *Hygiea Internationalis* 12(1): 113-128.  
DOI: 10.3384/hygiea.1403-8668.16121113.

Belloni, M., E. Meschi and G. Pasini (2016): **The effect on mental health of retiring during the economic crisis.** *Health Economics* 25(S2): 126-140.  
DOI: 10.1002/hec.3377.

Ben-David, N., D. Halperin, R. Katz, A. Lowenstein and A. Tur-Sinai (2016): **A method for estimating the participation rate of elder care.** *Theoretical Economics Letters* 6: 474- 479.  
DOI: 10.4236/tel.2016.63054.

Benítez, I., J. He, F. Van de Vijer and J.-L. Padilla (2016): **Linking extreme response style to response processes: a cross-cultural mixed methods approach.** *International Journal of Psychology.*  
DOI: 10.1002/ijop.12379.

Bianchini, L. and M. Borella (2016): **Retirement and memory in Europe.** *Ageing & Society.*  
DOI: 10.1017/S0144686X15000434.

Biro, A. (2016): **Outpatient visits after retirement in Europe and the US.** *International Journal of Health Economics and Management.*  
DOI: 10.1007/s10754-016-9191-7.

Bodner, E. and Y. S. Bergman (2016): **Loneliness and depressive symptoms among older adults: the moderating role of subjective life expectancy.** *Psychiatry Research* 237: 78-82.  
DOI: 10.1016/j.psychres.2016.01.074.

Boháček, R. and J. Zubrický (2016): **A flat tax reform in an economy with occupational choice and financial frictions.** *The Economic Journal* 122 (565): 1313-1345.  
DOI: 10.1111/j.1468-0297.2012.02527.x.

Bordone, V., B. Arpino and A. Aassve (2016): **Patterns of grandparental child care across Europe: the role of the policy context and working mothers' need.** *Ageing & Society.*  
DOI: 10.1017/S0144686X1600009X.

Bordone, V. and H. A. de Valk (2016): **Intergenerational support among migrant families in Europe.** *European Journal of Ageing.*  
DOI: 10.1007/s10433-016-0363-6.

Bosque-Prous, M., T. Brugal, K. Lima, J. Villalbi, M. Bartroli and A. Espelt (2016): **Hazardous drinking in people aged 50 years or older: a cross-sectional picture of Europe, 2011–2013**. *International Journal of Geriatric Psychiatry*. DOI: 10.1002/gps.4528.

Brenna, E. and C. Di Novi (2016): **Is caring for older parents detrimental to women's mental health? The role of the European North–South gradient**. *Review of Economics of the Household* 14 (4): 745–778. DOI: 10.1007/s11150-015-9296-7.

Brunello, G., G. Weber and C. Weiss (2016): **Books are forever: Early life conditions, education and lifetime earnings in Europe**. *Economic Journal*. DOI: 10.1111/eoj.12307.

Buffel, V., S. Missinne and P. Bracke (2016): **The social norm of unemployment in relation to mental health and medical care use: the role of regional unemployment levels and of displaced workers**. *Work Employment & Society*. DOI: 10.1177/0950017016631442.

Buz, J. and M. Cortés-Rodríguez (2016): **Measurement of the severity of disability in community-dwelling adults and older adults: interval-level measures for accurate comparisons in large survey data sets**. *BMJ Open* 6 (9). DOI: 10.1136/bmjopen-2016-011842.

Calvó-Perxas, L., J. Vilalta-Franch, O. Turró-Garriga, S. López-Pousa and J. Garre-Olmo (2016): **Gender differences in depression and pain: a two year follow-up study of the Survey of Health, Ageing and Retirement in Europe**. *Journal of Affective Disorders* 193: 157–164. DOI: 10.1016/j.jad.2015.12.034.

Carrieri, V. and A. Wübker (2016): **Quasi-experimental evidence on the effects of health information on preventive behaviour in Europe**. *Oxford Bulletin of Economics and Statistics*. DOI: 10.1111/obes.12134.

Celidoni, M. and V. Rebba (2016): **Healthier lifestyles after retirement in Europe? Evidence from SHARE**. *The European Journal of Health Economic*. DOI: 10.1007/s10198-016-0828-8.

Cho, I. (2016): **Health and households' portfolio choices in Europe**. *Review of European Studies* 8 (4): 183–209. DOI: 10.5539/res.v8n4p183.

Conde-Sala, J., C. Portellano-Ortiz, L. Calvó-Perxas and J. Garre-Olmo (2016): **Quality of life in people aged 65+ in Europe: associated factors and models of social welfare—analysis of data from the SHARE project (Wave 5)**. *Quality of Life Research*. DOI: 10.1007/s11136-016-1436-x.

Costa-Font, J., M. Karlsson and H. Øien (2016): **Careful in the crisis? Determinants of older people's informal care receipt in crisis-struck European countries**. *Health Economics* 25(Suppl. 2): 25–42. DOI: 10.1002/hec.3385.

Courtin, E. and M. Avendado-Pabon (2016): **Under one roof: The effect of co-residing with adult children on depression in later life**. *Social Science & Medicine* 168: 140–149. DOI: 10.1016/j.socscimed.2016.09.020.

Damri, N. and H. Litwin (2016): **Minority population group status and QOL change: the case of older Israelis**. *European Journal of Ageing* 13 (4): 299–309. DOI: 10.1007/s10433-016-0396-x.

# SHARE-BASED JOURNAL PUBLICATIONS 2016

Deindl, C. and M. Brandt (2016): **Support networks of childless older people: informal and formal support in Europe.** *Ageing & Society*. DOI: 10.1017/S0144686X16000416.

Deindl, C. and N. Tieben (2016): **Resources of grandparents: educational outcomes across three generations in Europe and Israel.** *Journal of Marriage and Family*. DOI: 10.1111/jomf.12382.

Denny, K. (2016): **Are the effects of height on well-being a tall tale?** *Journal of Happiness Studies*. DOI: 10.1007/s10902-016-9785-2.

Di Gessa, G., K. Glaser and A. Tinker (2016): **The impact of caring for grandchildren on the health of grandparents in Europe: A lifecourse approach.** *Social Science & Medicine* 152: 166-175. DOI: 10.1016/j.socscimed.2016.01.041.

Di Gessa, G. and E. Grundy (2016): **The dynamics of paid and unpaid activities among people aged 50-69 in Denmark, France, Italy, and England.** *Research on Aging*. DOI: 10.1177/0164027516654521.

Espelt, A., M. Mari-Dell'Olmo, E. Penelo and M. Bosque-Prous (2016): **Applied prevalence ratio estimation with different regression models: An example from a cross-national study on substance use research.** *Adicciones* 20(10). DOI: 10.20882/adicciones.823.

Fort, M., N. Schneeweis and R. Winter-Ebmer (2016): **Is education always reducing fertility? Evidence from compulsory schooling reforms.** *The Economic Journal* 126 (595): 1823-1855. DOI: 10.1111/ecoj.12394.

Hajek, A. and H.-H. König (2016): **Longitudinal predictors of functional impairment in older adults in Europe - evidence from the Survey of Health, Ageing and Retirement in Europe.** *Plos One* 11(1): e0146967. DOI: 10.1371/journal.pone.0146967.

Heger, D. (2016): **The mental health of children providing care to their elderly parent.** *Health Economics*. DOI: 10.1002/hec.3457.

Herbers, D. and C. Mulder (2016): **Housing and subjective well-being of older adults in Europe.** *Journal of Housing and the Built Environment*. DOI: 10.1007/s10901-016-9526-1.

Hessel, P. and M. Avendano (2016): **Economic downturns during the life-course and late-life health: an analysis of 11 European countries.** *European Journal of Public Health*. DOI: <http://dx.doi.org/10.1093/eurpub/ckw063>.

Hlebec, V., A. Srakar and B. Majcen (2016): **Care for the elderly in Slovenia: a combination of informal and formal care.** *Croatian Journal of Social Policy* 2016 (2): 159-179. DOI: 10.3935/rsp.v23i2.1317.

Hüse, L., É. Huszti, A. Toldi and P. Takács (2016): **Elements of the elderly's subjective well-being – An international comparison focusing on the member countries of the Visegrad group.** *Kontakt* 3 (2016): 202-211.

Jiménez Martín, S., J. Labeaga and C. Vilaplana Prieto (2016): **Interactions between private health and long-term care insurance and the effects of the crisis: evidence for Spain.** *Health Economics* 25(Suppl. 2): 159-179. DOI: 10.1002/hec.3440.

Kalmijn, M. and H. van de Werfhorst (2016): **Sibship Size and Gendered Resource Dilution in Different Societal Contexts**. Plos One. DOI: 10.1371/journal.pone.0160953.

Khalaila, R. (2016): **Depression statuses and related predictors in later life: A 10-year follow-up study in Israel**. European Journal of Ageing. DOI: 10.1007/s10433-016-0384-1.

Kiilo, T., K. Kasearu and D. Kutsar (2016): **Intergenerational Family Solidarity. Study of Older Migrants in Estonia**. GeroPsych: The Journal of Gerontopsychology and Geriatric Psychiatry 29: 71-80. DOI: 10.1024/1662-9647/a000144.

Kovacic, J. and V. M. Varnai (2016): **A graphical model approach to systematically missing data in meta-analysis of observational studies**. Statistics in Medicine. DOI: 10.1002/sim.7010.

Kröger, H., J. Fritzell and R. Hoffmann (2016): **The Association of Levels of and Decline in Grip Strength in Old Age with Trajectories of Life Course Occupational Position**. Plos One. DOI: 10.1371/journal.pone.0155954.

Krutilova, V. (2016): **Unmet need for health care – a serious issue for European elderly?** Procedia - Social and Behavioral Sciences 220: 217 – 225. DOI: 10.1016/j.sbspro.2016.05.487.

Kouwenhoven-Pasmooij, T., A. Burdorf, J. Roos-Hesselink, M. Hunink and S. Robroek (forthcoming): **Cardiovascular disease, diabetes and early exit from paid employment in Europe; the impact of work-related factors**. International Journal of Cardiology. DOI: 10.1016/j.ijcard.2016.04.090.

Lewin-Epstein, N. and M. Semyonov (2016): **Household debt in midlife and old age: a multinational study**. International Journal of Comparative Sociology. DOI: 10.1177/0020715216653798.

Lifshitz-Vahav, H., A. Shrira and E. Bodner (2016): **The reciprocal relationship between participation in leisure activities and cognitive functioning: the moderating effect of self-rated literacy level**. Aging & Mental Health. DOI: 10.1080/13607863.2015.1124838.

Litwin, H., E. Schwartz and D. Avital (2016): **Religiosity and well-being among older Jewish Israelis: findings from SHARE**. Journal of Religion, Spirituality & Aging. DOI: 10.1080/15528030.2015.1132491.

Litwin, H., E. Schwartz and N. Damri (2016): **Cognitively stimulating leisure activity and subsequent cognitive function: a share-based analysis**. Gerontologist. DOI: 10.1093/geront/gnw084.

Lutz, J., K. Morton, N. A. Turiano and A. Fiske (2016): **Health conditions and passive suicidal ideation in the Survey of Health, Ageing, and Retirement in Europe**. Journals of Gerontology: Social Sciences. DOI: 10.1093/geronb/gbw019.

Madero-Cabib, I. and A. E. Fasang (2016): **Gendered work-family life courses and financial well-being in retirement**. Advances in Life Course Research: 43-60. DOI: 10.1016/j.alcr.2015.11.003.

Memel, M., K. J. Bourassa, C. Woolverton and D. A. Sbarra (2016): **Body mass and physical activity uniquely predict change in cognition for aging adults**. Annals of Behavioral Medicine. DOI: 10.1007/s12160-015-9768-2.

# SHARE-BASED JOURNAL PUBLICATIONS 2016

Minicuci, N., N. Naidoo, S. Chatterji and P. Kowal (2016): **Data Resource Profile: Cross-national and cross-study sociodemographic and health-related harmonized domains from SAGE plus ELSA, HRS and SHARE (SAGE 1, Wave 1)**. *International Journal of Epidemiology* 45 (5): 1403-140j.  
DOI: 10.1093/ije/dyw181.

Möhring, K. (2016): **Life course regimes in Europe: individual employment histories in comparative and historical perspective**. *Journal of European Social Policy* 26: 124–139.  
DOI: 10.1177/0958928716633046.

Mönkediek, B. and H. A. Bras (2016): **The interplay of family systems, social networks and fertility in Europe cohorts born between 1920 and 1960**. *Economic History of Developing Regions* 31(1): 136-166.  
DOI: 10.1080/20780389.2015.1109441.

Mudrazija, S. (2016): **Public transfers and the balance of intergenerational family support in Europe**. *European Societies*.  
DOI: 10.1080/14616696.2016.1207792.

Niedzwiedz, C., E. Richardson, H. Tunstall, N. Shortt, R. Mitchell and J. Pearce (2016): **The relationship between wealth and loneliness among older people across Europe: Is social participation protective?** *Preventive Medicine*.  
DOI: 10.1016/j.ypmed.2016.07.016.

Nielsen, C., A. Halling and K. Andersen-Ranberg (2016): **Disparities in multimorbidity across Europe – Findings from the SHARE survey**. *European Geriatric Medicine*.  
DOI: 10.1016/j.eurger.2016.11.010.

Olivera, J. (2016): **The division of inter-vivos parental transfers in Europe**. *The Journal of the Economics of Ageing*.  
DOI: 10.1016/j.jjeoa.2016.05.005.

Palladino, R., J. T. Lee, M. Ashworth, M. Triassi and C. Millett (forthcoming): **Associations between multimorbidity, healthcare utilisation and health status: evidence from 16 European countries**. *Age and Ageing*.  
DOI: 10.1093/ageing/afw044.

Palladino, R., J. Tayu Lee, T. Hone, F. Filippidis and C. Millett (2016): **The great recession and increased cost sharing in European health systems**. *Health Affairs* 35(7): 1204–1213.  
DOI: 10.1377/hlthaff.2015.1170.

Penders, Y., J. Rietjens, G. Albers, S. Croezen and L. Van den Block (2016): **Differences in out-of-pocket costs of healthcare in the last year of life of older people in 13 European countries**. *Palliative Medicine*.  
DOI: 10.1177/0269216316647206.

Petrová Kafková, M. (2016): **The „real“ old age and the transition between the third and fourth age**. *Sociológia* 48 (6): 622-640.

Pi Alperin, M. N. (2016): **A multidimensional approach to measure health**. *Economics Bulletin* 36(3).  
Pin, S. and D. Spini (2016): **Impact of falling on social participation and social support trajectories in a middle-aged and elderly European sample**. *SSM - Population Health* 2: 382–389.  
DOI: 10.1016/j.ssmph.2016.05.004.

Ponomarenko, V. (2016): **Cumulative disadvantages of non-employment and non-standard work for career patterns and subjective well-being in retirement.** *Advances in Life Course Research*.  
DOI: 10.1016/j.alcr.2016.06.003.

Priestley, M., M. Stickings, E. Loja, S. Grammenos, A. Lawson, L. Waddington and B. Fridriksdottir (2016): **The political participation of disabled people in Europe: Rights, accessibility and activism.** *Electoral Studies* 42: 1-9.  
DOI: 10.1016/j.electstud.2016.01.009.

Principi, A., H. Galenkamp, R. Papa, M. Socci, B. Suanet and A. Schmidt (2016): **Do predictors of volunteering in older age differ by health status?** *European Journal of Ageing*.  
DOI: 10.1007/s10433-016-0377-0.

Reeuwijk, K., D. van Klaveren, R. van Rijn, A. Burdorf and S. Robroek (2016): **The influence of poor health on competing exit routes from paid employment among older workers in 11 European countries.** *Scandinavian Journal of Work, Environment and Health*.  
DOI: 10.5271/sjweh.3601.

Sabater, A. and E. Graham (2016): **Intergenerational exchanges, children's education and parents' longevity in Europe.** *Centre for Population Change Working Paper* 77.  
DOI: ISSN 2042-4116.

Sabater, A. and E. Graham (2016): **The role of children's education for the mental health of aging migrants in Europe.** *GeroPsych: The Journal of Gerontopsychology and Geriatric Psychiatry* 29: 81-92.  
DOI: 10.1024/1662-9647/a000145.

Salinas, G. L. A., M. S. Fernández, I. Marina Pascual, R. M. Asenjo, A. Recio-Mayoral and L. S. Ramos (2016): **Frailty is a short-term prognostic marker in acute coronary syndrome of elderly patients.** *European Heart Journal: Acute Cardiovascular Care*.  
DOI: 10.1177/2048872616644909.

Sand, G. and S. Gruber (2016): **Differences in subjective well-being between older migrants and natives in Europe.** *Journal of Immigrant and Minority Health*.  
DOI: 10.1007/s10903-016-0537-5.

Schmidt, A., S. Ilinca, K. Schulmann, R. Rodrigues, A. Principi and A. Sowa (2016): **Fit for caring: factors associated with informal care provision by older caregivers with and without multimorbidity.** *European Journal of Ageing*.  
DOI: 10.1007/s10433-016-0373-4.

Schulz, M. (2016): **Do gatekeeping schemes influence health care utilization behavior among patients with different educational background? An analysis of 13 European countries.** *International Journal of Health Services*.  
DOI: 0.1177/0020731416654663.

Schulz, M., A. E. Kunst and H. Brockmann (2016): **High educational attainment moderates the association between dental health-care supply and utilization in Europe.** *European Journal of Oral Sciences* 124(1): 52-61.  
DOI: 10.1111/eos.12237.

Shrira, A., Y. Palgi, E. Bodner and D. Shmotkin (2016): **Which category of lifetime adversity accelerates physical impairment among Israeli older adults?** *European Journal of Ageing*.  
DOI: 10.1007/s10433-016-0366-3.



# SHARE-BASED JOURNAL PUBLICATIONS 2016

Sirven, N. and T. Rapp (2016): **The dynamics of hospital use among older people evidence for Europe using share data.** Health Services Research. DOI: 10.1111/1475-6773.12518.

Souto Barreto, de, P., M. Cesari, S. Andrieu, B. Vellas and Y. Rolland (2016): **Physical activity and incident chronic diseases: a longitudinal observational study in 16 European countries.** American Journal of Preventive Medicine.

Sowa, A., B. Tobiasz-Adamczyk, R. Topór-Mądry, A. Poscia and D. I. la Milia (2016): **Predictors of healthy ageing: public health policy targets.** BMC Health Services Research 2016-16: 441-479. DOI: 10.1186/s12913-016-1520-5.

Srakar, A., R. Hren and V. Prevolnik Rupel (2016): **Health services utilization in older Europeans: an empirical study.** Organizacija - Journal of Management, Informatics and Human Resources 2: 127-137. DOI: 10.1515/orga-2016-0009.

Stolz, E., H. Mayerl, A. Waxenegger, E. Rasky and W. Freidl (2016): **Impact of socioeconomic position on frailty trajectories in 10 European countries: evidence from the Survey of Health, Ageing and Retirement in Europe (2004–2013).** Journal of Epidemiology and Community Health. DOI: 10.1136/jech-2016-207712.

Stolz, E., B. Fux, H. Mayerl, E. Rasky and W. Freidl (2016): **Passive suicide ideation among older adults in Europe: a multilevel regression analysis of individual and societal determinants in 12 countries (SHARE).** The Journals of Gerontology Series B: Psychological Sciences and Social Sciences: 947-958. DOI: 10.1093/geronb/gbw041.

Suemoto, C. K., P. Ueda, H. Beltrán-Sánchez, M. L. Lebrao, Y. A. Duarte and R. Wong (2016): **Development and Validation of a 10-year morality prediction model: Meta-analysis of individual participant data from five cohorts of older adults in developed and developing countries.** Journal of Gerontology: Biological Sciences. DOI: 10.1093/gerona/glw166.

Sundberg, L., N. Agahi, J. Fritzell and S. Fors (2016): **Trends in health expectancies among the oldest old in Sweden, 1992–2011.** European Journal of Public Health. DOI: 10.1093/eurpub/ckw066.

Tomini, F., S. Tomini and W. Groot (2016): **Understanding the value of social networks in life satisfaction of elderly people: a comparative study of 16 European countries using SHARE data.** BMC Geriatrics 16:203. DOI: 10.1186/s12877-016-0362-7.

Tomini, F., W. Groot and S. Tomini (2016): **Informal care and gifts to and from older people in Europe: The interlinks between giving and receiving.** BMC Health Services Research 16:603. DOI: 10.1186/s12913-016-1830-7.

Trevisan, E. and F. Zantomio (2016): **The impact of acute health shocks on the labour supply of older workers: evidence from sixteen European countries.** Labour Economics 43: 171-185. DOI: 10.1016/j.labeco.2016.04.002.

Trias-Llimós, S., M. Muszyńska, A. Cámara and F. Janssen (2016): **Smoking cessation among European older adults: the contributions of marital and employment transitions by gender.** European Journal of Ageing. DOI: 10.1007/s10433-016-0401-4.



van den Broek, T. and P. Dykstra (2016): **Residential care and care to community-dwelling parents: out-selection, in-selection and diffusion of responsibility.** Ageing & Society. DOI: 10.1017/S0144686X16000519.

van Hedel, K., I. Mejía-Guevara, M. Avendaño, E. Sabbath, L. Berkman, J. Mackenbach and F. van Lenthe (2016): **Work-family trajectories and the higher cardiovascular risk of American women relative to women in 13 European countries.** American Journal of Public Health. DOI: 10.2105/AJPH.2016.303264.

Verropoulou, G. and M. Zakyntinou (2016): **Contrasting concurrent and childhood socioeconomic predictors of self-rated health among older European men and women.** Journal of Biosocial Science. DOI: 10.1017/S0021932016000250.

Wahrendorf, M., B. Akinwale, R. Landy, K. Matthews and D. Blane (2016): **Who in Europe works beyond the state pension age and under which Conditions? Results from SHARE.** Journal of Population Ageing. DOI: 10.1007/s12062-016-9160-4.

Weber, D., S. Dekhtya and A. Herlitz (2016): **The Flynn effect in Europe – Effects of sex and region.** Intelligence: 39–45. DOI: 10.1016/j.intell.2016.11.003.

Weinstein, G. (2016): **Childhood conditions and current physical performance among non-institutionalized individuals aged 50+ in Israel.** European Journal of Ageing. DOI: 10.1007/s10433-016-0380-5.

Wind, B. and C. DeWilde (2016): **Home-ownership and housing wealth of elderly divorcees in ten European countries.** Ageing & Society. DOI: 10.1017/S0144686X16000969.

Worts, D., L. Corna, A. Sacker, A. McMunn and P. McDonough (2016): **Understanding older adults' labour market trajectories: a comparative gendered life course perspective.** Longitudinal and Life Course Studies 7 (4): 347–367. DOI: 0.14301/lcs.v7i4.389.



The achievements to date are impressive, especially in the light of the huge challenges of achieving a strong coordination across a large number of countries with quite disparate survey traditions and experiences.

- Report of the SHARE Evaluation Panel



# OPERATIONAL ASPECTS

## SHARE THANKS

SHARE is grateful for the financial support received. We thank the EU 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 IN MUNICH





**On 14th of April, 2016 the SHARE-ERIC Council meeting was held at Schloss Fürstenried in Munich.**

The meeting was divided into two parts: an open morning session and a closed session in the afternoon only for the SHARE-ERIC member countries.

A special welcome was given to representatives from the new SHARE countries: Bulgaria, Cyprus, Finland, Latvia, Malta, Romania and Slovakia, which had been recently included into the SHARE study via a DG EMPL grant.



The **scientific presentations** were focused on the collection of the Dried blood spots during Wave 7 which had been a huge logistical challenge, as well as the already ongoing preparations for Wave 7, which will be a combination of the standard questionnaire plus life histories. An overview was given on future scientific focuses for the remaining waves, which are: cognition, cognitive disorders, accelerometry (Wave 8) and retirement and baby boomers (Wave 9/ 10). The Council participants showed also special interest in the SHARE user numbers and publications and all efforts taken to increase response rates (e.g. by incentives).

The **administrative part** during the closed session concerned two main areas: The long-term sustainability of SHARE and the preparation of the **evaluation** of SHARE after Phase II: The SHARE-ERIC members adopted the **long-term funding strategy** which implies on a long run a permanent financial involvement of DG EMPL. Concerning the composition of the SHARE evaluation committee the SHARE-ERIC members agreed that the committee including the chair should mainly consists of external experts.





# SHARE EVALUATION SITE MEETING

On the 19th Dec., 2016 the SHARE **evaluation site meeting** took place at the premises of SHARE-ERIC in Munich. Members of this group were well-known scientists from different scientific areas: Prof. John Hobcraft (chair), Prof. Lisa Berkman, Prof. Monika Buetler, Prof. Mary Beth Ofstedal, Prof. Robert Willis and Prof. Hans-Werner Wahl. The composition of that group was based on a SHARE-ERIC Council decision. The result of the evaluation will be published in February 2017.

The implementation of an external evaluation is provided according to SHARE-ERIC statutes after phase II. A positive result is a prerequisite for the continuation of SHARE in phase III.



The Panel were extremely impressed by the professionalism and high quality of the SHARE programme and staff. There was an overall clarity of vision and purpose.

- Report of the SHARE Evaluation Panel





# WELCOME BULGARIA!

NEW SCIENTIFIC  
PARTNER ORGANISATION

The Institute for the Study of Societies and Knowledge at the Bulgarian Academy of Sciences (ISSK-BAS) is the main national research centre in the sphere of social sciences in Bulgaria. The Institute carries out fundamental and applied research, consulting and expert ac-

tivities, and training of highly-qualified specialists, and it benefits institutions such as the European Commission, the national government and especially the Ministry of Education, Youth and Science and the Ministry of Labour and Social Policy, municipalities and public agencies.



# SHARE TEAM BULGARIA

*The Bulgarian SHARE team from the Institute for the Study of the Societies and Knowledge from the Bulgarian Academy of Sciences (ISSK-BAS) includes several members:*



**Dr. Ekaterina Markova** (Country team leader) is senior research fellow at the Institute for the Study of the Societies and Knowledge at the Bulgarian Academy of Sciences since 2004. Her research interests are related to Survey Research Methodology, Policy Impact Measurement and Evaluation, Sociology of Labour, Vulnerability and Demographic Change. Ekaterina is member of the intra-institutional expert group for the implementation of the national demographic strategy at the Ministry of Labour and Social Policy. She has long term experience in national and international projects.



**Dr. Gabriela Yordanova** (Country team operator) has a master degree (2007) and a PhD degree (2013), both in sociology. In her occupational life, Gabriela combines applied survey researches (from 2006), university teaching (since 2009) and scientific research at ISSK-BAS. Currently, she is senior research associate at ISSK-BAS, specialised in Survey Methodology and Labour Sociology. Gabriela has long-term experience of survey and evaluation work for different ministries, municipalities and international projects.



**Dr. Vassil Kirov** (Expert), Associate Professor in ISSK-BAS and Associate researcher at the Centre Pierre Naville, University of Evry and at the European Trade Union Institute (ETUI). Vassil has research interests in sociology of enterprise, work and organisations, employment relations, demographic change and Europeanization.



**Dr. Eugenia Markova** (expert) is Senior Lecturer in Economics at the Brighton Business School, University of Brighton. She has an extensive research, consultancy and publication record on the economic and social aspects of labour migration. Her research has covered the UK, Greece, Bulgaria and Spain. Eugenia has worked for the London Metropolitan University, the London School of Economics and Political Science, the University of Sussex and the University of Athens in Greece and has done consultancy for the Open Society Institute in Sofia, Bulgaria, the Development Centre of OECD in Paris and the European Council.

**Diana Nenkova** (administrative assistant) is an experienced sociologist, working at ISSK-BAS, highly qualified in project management, research and administrative organisation.



## NEW SCIENTIFIC PARTNER ORGANISATION

The SHARE project in Cyprus is coordinated by the Economics Research Centre (CypERC) of the University of Cyprus. The CypERC, is an independent non-profit research institution aiming at high quality policy-oriented research in economics. While its emphasis is placed on matters concerning the Cyprus economy, research at CypERC has a broad perspective and aims at results of high academic standards with wide international interest. The main objective of CypERC is to contribute to the economic debate in Cyprus by disseminating research results with policy implications obtained from in-depth analysis and state-of-the-art empirical investigation. 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 University of Cyprus was established in 1989. Despite its brief history, it has earned the respect of the international academic community. Recently it has ranked 55th young university by the Times Higher Education (THE) World University Ranking. The main objectives of the university are twofold: the promotion of scholarship and education through teaching and research, and the enhancement of the cultural, social and economic development of Cyprus. It has 8 faculties, 22 departments and 11 research units.

# SHARE TEAM CYPRUS



**Nikolaos Theodoropoulos** (Country Team Leader) is an Assistant Professor of Economics at the University of Cyprus and academic fellow at the CypERC. He has a BSc in Economics (University of York, 1999) and an MSc (2001) and a PhD (2006) in Economics (University of Leicester). His research interests are in the area of labour economics. He is working on issues relating to immigration, social interactions, welfare programs, retirement, education, human capital, mobility, personnel economics, wage differentials, discrimination, and the econometric analysis of linked employer-employee data. He has worked on projects funded by the Economic and Social Research Council, the Boston College Centre for Retirement Research, and the U.S. Social Security Administration. He has published in journals such as the American Economic Review, Journal of Economics and Management Strategy, Oxford Economic Papers, Economic Inquiry, Journal of Population Economics and Research in Labor Economics. He is a book contributor published by the Oxford University Press.



**Alexandros Polycarpou** (Country Team Operator) is a researcher at the CypERC. He holds a BSc and an MSc in Economics Analysis from the University of Cyprus, and an MSc in Economics from the University of Wisconsin-Madison. He is also a PhD Candidate in Economics at the University of Cyprus. His research interests are in the areas of public and labour economics and he has worked on a number of projects about tax-evasion, active labour market policies, labour supply behaviour of individuals, tax and benefit systems simulation and the returns of human capital investment funded by the Cyprus, Research Promotion Foundation, the University of Cyprus, the Cyprus Government, and the European Commission. He has published in journals such as *Economica*, *Labour Economics*, *International Journal of Educational Development*, *Water Resources Management*, and *Cyprus Economic Policy Review*.



# WELCOME FINLAND!

NEW SCIENTIFIC  
PARTNER ORGANISATION

# SHARE TEAM FINLAND

Finland is among the new countries joining SHARE for Wave 7. The Finnish research team currently includes **Anna Rotkirch** (research director, Country team leader), **Anneli Miettinen** (researcher, Country team operator) and **Mirkka Danielsbacka** (researcher), all at the Population Research Institute of Väestöliitto, the Finnish Family Federation. This team has specialised in the study of family relations including fertility and childbearing, gender equality and the time use of families. In the project “Generational transmissions in Finland” (GENTRANS) they have explored intergenerational assistance and helping with panel survey data of the baby boomers and their adult children. This previous project was designed to be partly comparable with SHARE while Finland remained outside SHARE.

The team is assisted by information specialist **Tiina Helamaa** and media consultant **Barita Rosenström** as well as the whole media team of Väestöliitto, the Finnish Family Federation.

**Anna Rotkirch**



**Anneli Miettinen**



**Mirkka Danielsbacka**



**Tiina Helamaa**





WELCOME LATVIA!

NEW SCIENTIFIC  
PARTNER ORGANISATION

SHARE Latvia is coordinated by Rīga Stradins University (RSU). Established in 1950, the RSU is a public university in the Republic of Latvia supervised by the Latvian Ministry of Health. Latvia's most eminent practitioners of medicine working in various spheres are educated at RSU. Nowadays, RSU educates specialists in the field of medicine and pharmacy and provides study programs in social sciences, natural sciences and public health.

The educational and research activities of RSU include the following thematic fields: health-care, social welfare, social and human sciences, information and communication sciences, commerce and administration, law, wildlife science, educational sciences.

>> *Further details* - <http://www.rsu.lv/eng/>

# SHARE TEAM LATVIA



**Signe Tomsone** (Country Team Leader) assoc. professor at the Department of Rehabilitation, dean of the Faculty of Rehabilitation. Research interests: older persons – environment interaction; different aspects of housing and their impact on health; ageing, disability and health in different cultural contexts; multidisciplinary and mixed methods research.



**Andrejs Ivanovs** (Country Team Operator) PhD candidate, Head of Statistics Unit. Research interests: social health determinants; tuberculosis; infection diseases and social-economic factors; health-related quality of life, workability index.



**Mirdza Kursīte** (Country Team Operator Assistant) MD, Project manager of Statistics Unit. Research interests: health-related quality of life; cancer prevention; culture and tradition impact on health behavior.

# WELCOME MALTA!



The Department of Gerontology, University of Malta serves as an international and interdisciplinary research centre that investigates key issues concerning older persons, later life and ageing. Through high quality research and postgraduate training, the Department contributes to a better understanding of the experience of ageing amongst different nations, societies and cultures, which in turn puts policy makers in a better strategic position to contribute towards improved policies for later life.

A key objective of the Department is to produce qualified and trained personnel engaged in the provision and planning of services to

older persons in the statutory, voluntary and private sectors. The emphasis is on basic gerontological training aimed at giving a better understanding of the various aspects of ageing and the needs of older persons, as well as the necessary skills to meet these needs adequately, thus improving their quality of life and wellbeing.

The Department of Gerontology offers four academic programmes - namely, Higher Diploma in Gerontology and Geriatrics, Master of Gerontology and Geriatrics, Master of Arts in Ageing and Dementia Studies, and Doctorate.



# SHARE TEAM MALTA

*The Maltese SHARE team from the Department of Gerontology includes the following members:*



**Marvin Formosa Ph.D.** (Country Team Leader) is Head of the Department of Gerontology, University of Malta. He also holds the posts of Chairperson of the National Commission for Active Ageing (Malta), Director of the University of the Third Age (Malta), Director of the International Institute on Ageing, United Nations - Malta (INIA). Published books include *Lifelong learning in later life* (with Brian Findsen, 2011), *Learning across generations* (with Schmidt-Hertha and Jelenc Krašovec, 2014), *Social class in later life* (with Paul Higgs, 2015), *Population ageing in Malta* (with Charles Scerri, 2015), *Ageing and later life in Malta* (2015), and *International perspectives on older adult education* (with Brian Findsen, 2016).



**Christian Vella** (Country Team Operator) graduated with a higher diploma in Hospitality Management in 2009, which he then followed up with a B.A. in Psychology and Sociology in 2012 and a Post-Graduate Diploma in Psychology in 2013, both conferred by the University of Malta. Mr. Vella subsequently joined the International Institute on Ageing, United Nations - Malta in 2014 as Research and Programme Officer. His role within INIA has encouraged him to delve further into the field of ageing, and is currently following a Masters of Arts in Ageing and Dementia Studies at the University of Malta. Mr. Vella's research interests include community, ageing and sexuality. His dissertation for his post-graduate diploma dissertation was titled 'The narratives of older gay men: The intersection of sexual identity with age'.



# WELCOME ROMANIA!

NEW SCIENTIFIC  
PARTNER ORGANISATION

SHARE Romania is coordinated by the Alexandru Ioan Cuza University of Iasi ([www.uaic.ro](http://www.uaic.ro)). The Alexandru Ioan Cuza University of Iasi is the oldest higher education institution in Romania. Since 1860, the university has been carrying on a tradition of excellence and innovation in the fields of education and research. With over 23.000 students and 745 academic staff, the university enjoys high prestige at national and international level and cooperates with 403 universities world-wide. The Alexan-

dru Ioan Cuza University is a member of some of the most important university networks and associations: *the Coimbra Group, EUA – European University Association, Utrecht Network, International Association of Universities, University Agency of Francophony* and the Network of Francophone Universities (RUFAC). These partnerships offer us the opportunity to experience changes, to have student and teacher mobilities and joint academic, research and strategy programmes.

# SHARE TEAM ROMANIA



**Alin Marius Andrieș** (Country Team Leader), PhD. Habil. in Finance, is Associate Professor of Banking at the Faculty of Economics and Business Administration and Senior Researcher at Research Center in Finance, Alexandru Ioan Cuza University of Iasi, Romania. Research interests: Households Finance, Financial Intermediation and Empirical Finance.



**Mircea Asandului** (Country Team Operator), PhD. in Cybernetics and Economic Statistics, is Senior Lecturer at the Department of Accounting, Business Information Systems and Statistics, Faculty of Economics and Business Administration, Alexandru Ioan Cuza University of Iasi. Research interests: Econometrics, Data analysis, and Economic growth.



**Bogdan Căpraru** (Expert), PhD Habil. in Finance, is Professor at the Faculty of Economics and Business Administration of Alexandru Ioan Cuza University of Iasi and PhD supervisor in Finance. Research interests: Households Finance and Retail banking.



**Daniela Viorică** (Expert), PhD. in Cybernetics and Economic Statistics, is Associate Professor at the Alexandru Ioan Cuza University of Iasi, Faculty of Economics and Business Administration, Department of Accounting, Business Information Systems and Statistics. Research interests: Econometrics, Sampling Data analysis, Statistical Software Packages.



**Iulian Ilnatov** (Expert), PhD, is Senior Lecturer at the Faculty of Economics and Business Administration at Alexandru Ioan Cuza University of Iasi, Romania. Research interests: Empirical Finance, Emerging Markets and Households Finance.



The Panel were unanimous in strongly endorsing the need for a new funding model that provides core support for a minimal survey of 2000 panel participants in every country and adequate funding for central functions.



# FINANCIAL ASPECTS

## SHARE'S FUNDING

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

# FINANCIAL ASPECTS

This section provides the Financial Statement for 2016 as required by the SHARE-ERIC Statutes, a general overview of the current financial situation of all of SHARE, and the Financial Plan for 2017.

## FINANCIAL STATEMENT FOR SHARE-ERIC 2016

The accounting for the financial year 2016 could be closed beginning of March 2017 with an audit report which found all figures provided below (Figure 11) and in the detailed country tables (Figure 12) in agreement with the bank accounts.

**Figure 11:** Summary flow of funds in calendar year 2016

### Summary

2016

By expense/contribution type:

Type	Code	Expenses	Contributions	Gain/Loss
<b>INITIAL BALANCE</b>				<b>3.510.787,83</b>
CC: Country Contributions acc. to Art.9	CC	0,00	1.184.169,70	1.184.169,70
GC: Grants & contracts	GC	1.639.248,07	3.933.667,04	2.294.418,97
MF: Membership fees	MF	10.000,00	110.000,00	100.000,00
II: Interest income	II	0,00	0,00	0,00
VA: VAT reimbursement	VA	0,00	192.565,43	192.565,43
		0,00	0,00	
SV: Survey costs	SV	3.291.504,38	25.115,14	-3.266.389,24
PE: Personnel costs	PE	0,00	0,00	0,00
TV: Travel costs	TV	79.958,39	1.027,00	-78.931,39
MA: Materials costs	MA	40.743,66	2.250,00	-38.493,66
AC: Account and other charges	AC	7.464,32	6.945,41	-518,91
SC: Other subcontracts	SC	288.999,67	21.374,17	-267.625,50
CD: Column D	CD	0,00	0,00	0,00
XX: unknown, not yet categorized	XX	0,00	0,00	0,00
<b>TOTAL FLOWS</b>		<b>5.357.918,49</b>	<b>5.477.113,89</b>	<b>119.195,40</b>
<b>END BALANCE</b>				<b>3.629.983,23</b>

Column 3 in Figure 11 shows the 2016 pretest and field rehearsal survey expenses of Wave 7 plus some remaining main survey expenses of wave 6, expenses for subcontracts including the costs of international coordination outside Munich, plus other minor expenses in 2016. Column 4 shows the contributions from member countries including €110k membership fees and grants (almost €4m) received in 2016. Relative to the large volume of inflows and outflows (each exceeding €5m), the difference between inflows and outflows is small and positive (€119k). The large account balance (€3.6m) is due to country contributions received in 2016 for remaining survey costs of wave 6 to be paid in 2016, as well as pre-financing amounts for wave 7 and 8 received in 2016.

Figure 12 shows the expense items and financing sources for all expenditures in 2016. The totals differ slightly from Figure 11 since, on the one hand, some income arrived already in year 2015 and, on the other hand, some expenses which are attributable to 2016 were invoiced only in 2017. We show the situation as originally planned at the SHARE-ERIC Council meeting in March 2016 and the final accounts as of March 2017.

Several line items are worth noting. First, one country has not paid its membership fee resulting in a loss of some €4500 in administrative expenses. Second, the Column D account has been closed as the Commission has resumed sponsoring the international coordination of SHARE through the SHARE-DEV3 grant. Third, not all country accounts are balanced. Italy, Slovenia and Spain have negative balances. In Italy and Slovenia, the excess survey expenses have been covered by the previous account balance. In Spain, the last payment by DG Employment is still outstanding but will cover the balance. Sweden and Croatia have positive balances. Sweden has prepaid part of the 2017 expenses, while Croatia has refunded invalid interviews to be re-done in 2017. Both will be accounted as survey contributions for 2017 in Figure 13 below.

## FUNDING ALL OF SHARE

The entire SHARE operation costs about €17m per annum for the 28 countries participating in Wave 7. While SHARE is relatively expensive for a social sciences project, it is much cheaper than most of the ESFRI projects in the natural sciences.

Only about a third of the overall SHARE income and expenses are flowing through the SHARE-ERIC. One reason is that not all SHARE member countries are currently SHARE-ERIC members. In addition, not all expenses for SHARE-ERIC countries are showing up in the ERIC accounts. First, most ERIC members pay the personnel in kind (mostly as salaries by the universities and other scientific institutions). Second, some ERIC members also pay the survey expenses directly (especially if the survey is conducted by a university or scientific organization rather than subcontracted to a third-party provider).

In turn, third-party grants (e.g., H2020 and US NIA) received by SHARE-ERIC are partially dedicated to non-SHARE-ERIC members (e.g. support by the EU Commission for crisis countries) and to purposes for all of SHARE (e.g. support by the EU Commission for the area coordination outside of Munich).

SHARE funding is complex. In addition to the only partial overlap between SHARE and SHARE-ERIC, complexity arises through the multitude of funders on the international and the national levels. In Wave 6, we had 58 different funding sources which contributed €10,000 or more, plus smaller contributors.

Overall funding for SHARE has four different cost components:

- The largest component (about €12m) is running the survey in each SHARE country. The eight new countries have been financed by the Commission (DG Employment).
- International coordination has two components:
  - First, the international coordination activities which take place at the Munich headquarter (about €1.5m annually). They are covered by a grant from the Federal Ministry for Research and Education (BMBF) and the Max Planck Society (MPG).
  - Second, Commission support (H2020 call INFRADEV3) has been granted for the international coordination activities which take place in Denmark, France, Israel, Italy and The Netherlands (about €1.5m annually).
- Finally, several other grants (H2020, US National Institute on Aging; totaling about €2m per annum) finance innovation and harmonization activities. Particularly noteworthy is the support by the US National Institute on Aging (NIA) which is funding those parts of the survey that are closely harmonized with the US Health and Retirement Study, the sister survey of SHARE, plus several laboratory analyses of the DBSS in Seattle, Washington State.



Figure 12: Detailed flow of funds in calendar year 2016

Income		Amount	Expenditure		Amount
<b>Membership fee 2016</b>			<b>ERIC administration 2016</b>		
1	AT	10.000,00 €	Account charges/transaction fees		518,91 €
2	BE	10.000,00 €	Auditor		4.500,00 €
3	CZ	10.000,00 €	Budget SMB/Travel		40.016,14 €
4	DE	10.000,00 €	0.5 FTE accountant		23.803,16 €
5			Council meeting		2.548,49 €
6	GR	- €	Travel to ERIC network meeting		1.384,87 €
7			Other admin (domains)		1.685,81 €
8	IL	10.000,00 €	Evaluation meeting December		8.267,76 €
9	IT	10.000,00 €	Print annual activity report		1.904,93 €
10	NL	10.000,00 €	Travel Evaluators		20.125,01 €
11	PL	10.000,00 €			
12	SE	10.000,00 €			
13	SI	10.000,00 €			
14	total income	100.000,00 €	total expenditures		104.755,08 €
			<b>loss</b>		<b>- 4.755,08 €</b>
<b>Column D, 2015H1</b>			<b>Int'l Coordination ex Munich, 2015H1 as of 31.12.2016</b>		
15	AT	45.997,00 €	IT support: CentERdata Tilburg		181.125,15 €
16	BE	42.964,00 €	Economics Area: Padua/Venice		158.618,58 €
17	CZ	18.449,00 €	Health Area: Odense		110.592,82 €
18	DE	41.195,00 €	Social Area: Jerusalem		52.643,14 €
19	GR	21.735,00 €	Survey Mgmt/Methodology: Paris		7.854,94 €
20	IL	32.801,00 €	Health Care Area: Wuppertal		11.206,93 €
21	IT	32.476,00 €	SHARE-ERIC Admin: Madrid		- €
22	NL	45.239,00 €	New Countries coordination costs		61.546,07 €
23	PL	16.112,00 €			
24	SE	48.335,00 €			
25	SI	21.735,00 €			
26	CH	48.335,00 €			
27	DK	48.335,00 €			
28	EE	16.428,00 €			
29	ES				
30	FR	39.300,00 €			
31	HR	16.112,00 €			
32	HU				
33	LUX	48.335,00 €			
34	PT				
35	total income	583.883,00 €	total expenditures		583.587,63 €
36			<b>surplus</b>		<b>295,37 €</b>
<b>EU-COM 2016</b>			<b>Int'l Coordination ex Munich, 2016</b>		
37	SERISS	374.136,25 €	IT support: CentERdata Tilburg		336.614,76 €
38	SHARE-DEV3	895.970,00 €	Economics Area: Padua		188.435,58 €
39			Economics Area: Venice		208.485,92 €
40			Health Area: Odense		174.296,34 €
41			Social Area: Jerusalem		134.919,66 €
42			Survey Mgmt/Methodology: Paris		78.655,00 €
43			Health Care Area: Wuppertal		78.425,00 €
44			SHARE-ERIC Admin: Madrid		70.275,34 €
45	total income	1.270.106,25 €	total expenditures		1.270.107,60 €
46			<b>loss</b>		<b>- 1,35 €</b>

Figure 12: Detailed flow of funds in calendar year 2016 (continued)

	Income	Amount	ExpenditureA	mount
	<b>Survey contribution 2016</b>		<b>Survey costs 2016</b>	
47	AT	284.900,00 €	AT	284.900,00 €
48	BE* only partially	60.000,00 €	BE* only partially	60.000,00 €
49	CZ	147.200,00 €	CZ	147.200,00 €
50	DE	523.201,29 €	DE	523.201,29 €
51	FR		FR	
52	GR via SHAREDEV3	8.575,00 €	GR	8.575,00 €
53	IL*		IL*	
54	IT	170.498,00 €	IT	645.664,00 €
55	NL* only Internet		NL* only Internet	
56	PL	33.494,00 €	PL	33.494,00 €
57	SE	452.000,00 €	SE	232.000,00 €
58	SI	146.520,00 €	SI	251.626,00 €
59	CH*		CH*	
60	BG via DG EMPL	52.836,63 €	BG	52.836,63 €
61	CY via DG EMPL	38.940,00 €	CY	38.940,00 €
62	DK*		DK*	
63	EE*		EE	
64	ES via co-funding/DG EMPL W6/SHAREDEV3 W7	156.066,96 €	ES	310.454,32 €
65	FI via DG EMPL		FI	
66	HR via DG EMPL W6/SHAREDEV3 W7	53.138,24 €	HR	35.202,24 €
67	HU via SHAREDEV3	49.500,00 €	HU	49.500,00 €
68	LT via DG EMPL	- €	LT	- €
69	LV via DG EMPL	62.725,74 €	LV	62.725,74 €
69	LUX*		LUX*	
70	MT via DG EMPL	47.772,45 €	MT	47.772,45 €
71	PT*		PT*	
72	SK via DG EMPL		SK	
73	RO via DG EMPL		RO	
74	total income	2.287.368,31 €	total expenditures	2.784.091,67 €
75			loss	- 496.723,36 €
	<b>NIA IAG4 2016</b>		<b>Biomarker 2016</b>	
76	NIA grant	234.670,18 €	DBSS	234.670,18 €
	total income	234.670,18 €	total expenditures	234.670,18 €
			surplus	- €

\* funding not via SHARE-ERIC

## CURRENT FUNDING SITUATION

There is a third reason for the complex funding situation which gives rise to structural concern. It rests in the different time horizons of funding sources many of which are very short. While the funding situation for SHARE is stable in some countries with a reasonably long time horizon, it is fragile and very short term in many other countries. While this unpleasant situation has not changed much since SHARE-ERIC was founded, its negative implications have become increasingly more harming with the number of countries involved in SHARE.

Regarding funding in the SHARE member states, some countries did not manage to fund Wave 6, so SHARE still could not reach full coverage of the EU countries as projected in the SHARE-ERIC statutes. This is now the aim of Wave 7, but it is only achievable with a combination of help from DG Employment (the eight new SHARE countries) and DG Research (five crisis countries).

Long-term funding within the SHARE-ERIC is secured only in the Czech Republic (until 2022) and in Germany where the national research council (DFG) will fund SHARE until 2024 through the DFG long-term programme. Most other countries have short-term funding for one or two waves. Greece has re-entered Wave 6 after two waves without participation thanks to European Structural Funds but again has no funding for wave 7. Also Hungary, a new member of SHARE-ERIC, started with no own funding for the survey.

In the Netherlands, the former host country, funding for waves 6 and 7 switched to a university consortium and has been reduced to half of the amount that would have been necessary to interview the panel sample again. The reduced funding level permitted an experimental Internet survey which, however, will not be strictly comparable to the remainder of SHARE.

The situation in those SHARE countries which are not yet members of the ERIC also shows quite a diverse picture. Whereas most countries have short-term funding for one or two waves, some other countries are again struggling to obtain funding for wave 7. While Croatia and Spain had successfully applied for funds from DG Employment for wave 6, Wave 7 funding for Croatia, Spain and Portugal is now a combination of DG Research funds and national co-funding. We are glad to be able to use the limited "survey fund" granted by DG Research via the SHARE-DEV3 project to support these countries.

The SHARE-DEV3 project will end in 2018, increasing the financial uncertainty. It will be absolutely necessary to continue this Commission support in order to maintain a strictly harmonized survey suitable for cross-national comparisons. EU Commission support will also have to make up for the likely end of NIA support due to the change in the US administration and its strict "America first" priority also in research funding. This complex and fragile funding situation makes both financial and operational planning very difficult.

## FINANCIAL PLAN FOR SHARE-ERIC 2017

Figure 13 presents the financial plan for 2017 based on the current contributions (as of March 2017) and expected expenditure items. Note that only a fraction of the expected income has been credited on the SHARE-ERIC account so far. This holds for both membership fees and country contributions for the national surveys.

The financial plan is separated by: income from ERIC membership fee and its usage; income from EU-COM and its usage; survey contributions and costs; biomarker grant and expenditures. Several line items are worth noting:

1. Not all SHARE-ERIC members have paid their membership fee although we are optimistic that almost all members will pay. We therefore are not worried about the current outstanding negative balance of 22,500. There is once more uncertainty in Greece due to the uncertain funding situation at the time of writing of this report.
2. International coordination ex Munich is covered for all of 2017 through two H2020 grants SHARE-DEV3 and SERISS. This part is therefore balanced ex ante by definition. This support will end in mid 2018 and urgently needs to be extended.
3. The situation for wave 7 in the ERIC member countries at the time of the wave 7 post-pretest phase is still uncertain in The Netherlands. Greece and Hungary will be supported by the SHARE-DEV3 Survey Fund.
4. Amongst the non-ERIC member countries of SHARE, funding is still uncertain in Portugal. Funding is secured in Croatia, Estonia, and Spain – but only via the SHARE-DEV3 Survey Fund. National co-funding could be obtained for these countries.
5. Countries marked by an asterisk will fund the survey directly without funds flowing through SHARE-ERIC; the respective rows are therefore empty. The Swedish and Croatian contributions include their excess payments from 2016, see above. The eight new countries will obtain the majority of funds from DG Employment; 20% co-funding is secured.

The Evaluation Committee has noted the uncertainty of national support in almost half the number of all SHARE countries and emphasized the severe financial and operational risks to SHARE-ERIC. Once labor contracts have to be dissolved due to delayed funding a consequence in the national countries is a loss of investment and know-how about SHARE. The personnel involved necessary to run SHARE cannot be easily replaced as the survey operation requires highly qualified researchers with hands-on training and experience in running the survey and supervising the survey agency.

Another serious consequence of the uncertain financial situation are delays in contracting survey agencies and therefore also in starting operations in these countries while other countries are already steps ahead in the schedule. This has severe consequences on the central coordination schedule and involved personnel and costs, especially in software preparation but also on work load in the national and the central coordination teams. The resulting inefficiency of operations and governance is a great impediment for the scientific integrity of SHARE.

The Evaluation Committee has therefore strongly supported the plan to install a centrally funded “International Comparisons Subpanel” of about 2000 individuals in each SHARE country, together with central funds for the international coordination.

Figure 13: Financial Plan for SHARE-ERIC 2017

Income		Amount	Actually paid*	Expenditure		Amount
<b>Membership fee 2017</b>				<b>ERIC administration 2017</b>		
1	AT	10.000,00 €	Y	Account charges/transaction fees		1.500,00 €
2	BE	10.000,00 €	N	Auditor		6.000,00 €
3	CZ	10.000,00 €	Y	Budget SMB/travel		48.000,00 €
4	DE	10.000,00 €	Y	0.5 FTE accountant		31.000,00 €
5	FR	10.000,00 €	N	Council meeting/travel		9.000,00 €
6	GR	10.000,00 €	N	Other admin (translations, notary, domaine)		7.000,00 €
7	HU	10.000,00 €	Y	ERIC network meetings/travel		4.000,00 €
8	IL	10.000,00 €	Y	Print annual activity report		4.000,00 €
9	IT	10.000,00 €	N	ERIC Committee meeting		2.000,00 €
10	NL	10.000,00 €	Y			
11	PL	10.000,00 €	Y			
12	SE	10.000,00 €	Y			
13	SI	10.000,00 €	Y			
14	expected income	130.000,00 €		total expected expenditures		112.500,00 €
15	actual income		90.000,00 €	current loss		- 22.500,00 €
16	* as of 12 April 2017					
<b>EU-COM 2017</b>				<b>Int'l Coordination ex Munich, 2017</b>		
19	SERISS	374.136,25 €	Y	IT support: CentERdata Tilburg		336.614,76 €
20	SHARE-DEV3	895.970,00 €	Y	Economics Area: Padua		188.435,58 €
21				Economics Area: Venice		208.485,92 €
22				Health Area: Odense		174.296,34 €
23				Social Area: Jerusalem		134.919,66 €
24				Survey Mgmt/Methodology: Paris		78.655,00 €
25				Health Care Area: Wuppertal		78.425,00 €
26				SHARE-ERIC Admin: Madrid		70.275,34 €
27						
28	expected income	1.270.106,25 €		expected expenditures		1.270.107,60 €
29	actual income		1.270.106,25 €	current surplus		- 1,35 €
<b>Survey contribution 2017</b>				<b>Survey costs 2017</b>		
33	AT	731.570,00 €		AT		731.570,00 €
34	BE*	60.000,00 €		BE*		60.000,00 €
35	CZ	97.000,00 €		CZ		97.000,00 €
36	DE	856.000,00 €		DE		856.000,00 €
37	FR*	1.128.547,00 €		FR*		1.128.547,00 €
38	GR	218.575,00 €		GR		218.575,00 €
39	IL*			IL*		
40	IT	766.500,00 €		IT		766.500,00 €
41	NL	- €		NL		- €
42	PL	122.648,00 €		PL		122.648,00 €
43	SE	696.800,00 €	incl. 2016	SE		696.800,00 €
44	SI	245.756,00 €	incl. 2016	SI		245.756,00 €
45	BG via DG EMPL	107.300,00 €		BG		107.300,00 €
46	CH*			CH*		
47	CY via DG EMPL	79.000,00 €		CY		79.000,00 €
48	DK*			DK*		
49	EE cofunding+SHAREDEV3	266.360,00 €		EE		266.360,00 €
50	ES cofunding+SHAREDEV3	374.000,00 €		ES		374.000,00 €
51	FI via DG EMPL	548.150,00 €		FI		548.150,00 €
52	HR cofunding+SHAREDEV3	184.936,00 €	incl. 2016	HR		184.936,00 €
53	HU	150.000,00 €		HU		150.000,00 €
54	LT via DG EMPL	163.000,00 €		LT		163.000,00 €
55	LV via DG EMPL	127.353,00 €		LV		127.353,00 €
56	LUX*			LUX*		
57	MT via DG EMPL	97.000,00 €		MT		97.000,00 €
58	PT*			PT*		
59	SK via DG EMPL	129.500,00 €		SK		129.500,00 €
60	RO via DG EMPL	156.700,00 €		RO		156.700,00 €
61	expected income	7.306.695,00 €		expected expenditures		7.306.695,00 €
62	contractually obliged		7.306.695,00 €	current surplus		- €
<b>NIA IAG4 2017</b>				<b>Biomarker 2017</b>		
65	NIA grant	850.000,00 €	Y	DBS laboratory analyses		850.000,00 €
66						
67						
68	expected income	850.000,00 €		expected expenditures		850.000,00 €
	actual income		850.000,00 €	current surplus		- €

\* funding not via SHARE-ERIC

# SCIENTIFIC PARTNERS OF

## AUSTRIA

### University of Linz, Dept. of Economics

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

## BELGIUM – NL

### University of Antwerp, CSP

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

## BELGIUM – FR

### University of Liège, CREPP

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

## CZECH REPUBLIC

### CERGE-EI, Prague

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

## FRANCE

### LEDa-LEGOS, Paris-Dauphine University

The Department of Health Economics and Manage-

ment (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. Marie-Eve Joël, Professor of Economics, leads the French Country Team.

## GERMANY

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

Central coordination of SHARE takes place at MEA. MEA is a world-renowned centre of excellence for the economics of ageing. It moved 2011 from Mannheim to Munich after an offer to become part of the Max Planck Society. Research areas are savings, social insurance and public policy; macroeconomic implications of population ageing; and public health. MEA has been the coordination center of SHARE since its first wave. MEA is represented by Axel Börsch-Supan, director. The German Country Team is part of the Economics and Policy Research Department of the TUM School of Management which examines economic processes with a focus on the role of public policy. It addresses contemporary policy issues by means of theoretical as well as empirical investigations into economics (e.g. of aging). The German Country Team Leader is Annette Scherpenzeel.

## GREECE

### Panteion University, Athens

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

# SHARE-ERIC MEMBERS

## ISRAEL

### **The Hebrew University, IGDC**

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

## ITALY

### **University of Padua, Dept. of Economics**

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

## THE NETHERLANDS

### **University of Tilburg, Netspar**

Netspar is a scientific network for studies on Pensions, Ageing and Retirement connected to the Faculty of Economics and Business Administration of Tilburg University. Arthur van Soest leads the Dutch Country Team.

## POLAND

### **Centre for Economic Analysis, Szczecin**

The Centre for Economic Analysis (CenEA) is an independent research institute in Poland in the area of applied microeconomic analysis with a focus on household and firm behaviour and on the effects of economic policy on welfare and economic development. Michał Myck is director and member of the Board of Centre for Economic Analysis, CenEA and leader of the Polish Country Team.

## SLOVENIA

### **Institute for Economic Research Ljubiana (IER)**

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

## SWEDEN

### **Centre for Demographic and Ageing Research, Umeå University**

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



# SCIENTIFIC PARTNERS OF SHARE

## **CROATIA**

University of Zagreb – Faculty of Economics and Business, Zagreb

## **DENMARK**

University of Southern Denmark, Institute of Public Health, Odense

## **ESTONIA**

Tallinn University, Estonian Institute for Population Studies, Tallinn

## **HUNGARY**

Central European University, Department of Economics, Budapest

## **LUXEMBOURG**

CEPS/INSTEAD, Esch sur Alzette

## **PORTUGAL**

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

## **PORTUGAL**

Universidade do Minho, Braga

## **SPAIN**

Centro de Estudios Monetarios y Financieros (CEMFI), Madrid

## **SPAIN**

The Dipsalut, Organisme de Salut Pública – Diputació de Girona, Girona

## **SWITZERLAND**

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



# NEW SCIENTIFIC PARTNERS

## **BULGARIA**

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

## **CYPRUS**

University of Cyprus School of Economics and Management, Nicosia

## **FINLAND**

Väestöliitto, Kalevankatu 16, Helsinki

## **LATVIA**

Riga Stradins University, Riga

## **LITHUANIA**

University of Vilnius, Vilnius

## **ROMANIA**

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

## **SLOVAKIA**

Institute of Economic Research SAS, Bratislava





## VISIT YOUR COUNTRY TEAM ONLINE!

 SHARE-ERIC members

**Austria:** [www.share-eric.eu/at](http://www.share-eric.eu/at)

**Belgium:** [www.share-eric.eu/be](http://www.share-eric.eu/be)

**Czech Republic:** [www.share-eric.eu/cz](http://www.share-eric.eu/cz)

**France:** [www.share-eric.eu/fr](http://www.share-eric.eu/fr)

**Germany:** [www.share-eric.eu/de](http://www.share-eric.eu/de)

**Greece:** [www.share-eric.eu/gr](http://www.share-eric.eu/gr)

**Israel:** [www.share-eric.eu/il](http://www.share-eric.eu/il)

**Italy:** [www.share-eric.eu/it](http://www.share-eric.eu/it)

**Poland:** [www.share-eric.eu/pl](http://www.share-eric.eu/pl)

**Slovenia :**[www.share-eric.eu/si](http://www.share-eric.eu/si)

**Sweden:** [www.share-eric.eu/se](http://www.share-eric.eu/se)

SHARE members

**Croatia:** [www.share-eric.eu/hr](http://www.share-eric.eu/hr)

**Denmark:** [www.share-eric.eu/dk](http://www.share-eric.eu/dk)

**Estonia:** [www.share-eric.eu/ee](http://www.share-eric.eu/ee)

**Hungary:** [www.share-eric.eu/hu](http://www.share-eric.eu/hu)

**Ireland:** [www.share-eric.eu/ie](http://www.share-eric.eu/ie)

**Luxembourg:** [www.share-eric.eu/lu](http://www.share-eric.eu/lu)

**Netherlands:** [www.share-eric.eu/nl](http://www.share-eric.eu/nl)

**Portugal:** [www.share-eric.eu/pt](http://www.share-eric.eu/pt)

**Spain:** [www.share-eric.eu/es](http://www.share-eric.eu/es)

**Switzerland:** [www.share-eric.eu/ch](http://www.share-eric.eu/ch)



[share-eric.eu](http://share-eric.eu)

