



ANNUAL ACTIVITY REPORT

2024



SHARE-ERIC

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SHARE'S MISSION & VISION

Our Mission

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

SHARE is the largest pan-European social science panel study, providing internationally comparable longitudinal micro-data. This unique dataset offers invaluable insights into public health and socio-economic living conditions of individuals, making it a

vital resource for researchers and policymakers. As a harmonized, cross-national survey, SHARE creates a "natural laboratory" to explore the effects of diverse policy environments on ageing populations. Its life-course perspective and multidisciplinary approach – combining health, economics, and social sciences – make it a cornerstone in evidence-based policy development.

SHARE's impact is also growing globally. In addition to its comprehensive coverage of European countries, it is embedded in a worldwide network of sister studies, from the Americas to Eastern Asia to South Africa.

SHARE

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

Our Vision

How do people respond to a changing world?

Life expectancy is increasing – a positive development that brings new challenges. How can national social systems adapt to rising demands on pensions, health care, and social services? How can individuals enjoy longer lives that are healthy, economically secure, and fulfilling? And how can older adults navigate evolving health risks and social transformations?

By providing cross-nationally comparable high-quality longitudinal data with a life-course perspective, SHARE supports the evidence base needed to understand and shape responses to demographic change. In the coming years, SHARE will expand collaboration and research projects in key areas, such as:

- Baby Boomer Retirement, Silver Economy and Digitalization
- Health Prevention and Maintenance in an Ageing World
- Flexible Elderly Care
- Growing Inequalities in Income, Health, and Wealth



SHARE aspires to remain a global leader in harmonizing international surveys. Through continuous methodological innovations – such as multi-mode interviews, integration of objective health measures, and linkage with administrative data – SHARE strengthens the quality and relevance of its research.

The continued development of the SHARE BERLIN Institute marks a new phase in SHARE's scientific evolution, fostering new partnerships and research concepts while preserving the study's core strengths: its panel structure, multidisciplinary design, and international comparability.

SHARE's vision is to improve people's lives by enabling excellent research and policymaking that helps societies adapt to the complex process of population ageing and social change.



FOREWORD FROM THE CHAIR

Welcome to the 13th SHARE-ERIC Annual Activity Report which provides detailed insights into the scientific achievements, operational developments, and financial aspects of SHARE-ERIC in 2024.

Our consortium has remained committed to fostering collaboration and advancing scientific progress over the past year. This achievement would not have been possible without the continued support of the SHARE-ERIC member states, as well as all the countries participating in the survey. I deeply appreciate the dedication and contributions made by everyone involved throughout 2024.

I would also like to express my pleasure to welcome Lithuania as a new member of SHARE-ERIC. The membership was approved at the SHARE-ERIC Council meeting in November. This will strengthen our collaborative network and enrich our shared mission of maintaining scientific excellence as a leading research infrastructure in the social sciences and continuing to have a significant impact in our society.

The past year also marked a leadership transition. Dr. Sandro Holzheimer, Chair of SHARE-ERIC since 2021, stepped down in June 2024. We thank him sincerely for his leadership during a period of considerable change, including the establishment of the SHARE BERLIN Institute, the restructuring of coordination activities, and the handover of the Chairmanship. I extend my appreciation to the outgoing Management Board members Prof. Agar Brugiavini, Ph.D., Anne Laferrère, Ph.D., and Karen Andersen-Ranberg, Ph.D., and warmly welcome the newly appointed board members Prof. Šime Smolić, Ph.D., Prof. Dr. Bella Struminskaya, and Prof. Giacomo Pasini, Ph.D. as well as Prof. Dr. Jérôme Schoenmaeckers as the new Chair of the Assembly of Country Team Leaders. In addition, Prof. Dr. David Richter has taken on the role of Managing Director of SHARE-ERIC and will share more about this in his welcome message. I want to thank former Managing Director Prof. Dr. Axel Börsch-Supan for his long-standing commitment to the development of SHARE and Prof. Dr. Agnieszka Chłoń-Domińczak for her work as Acting Managing Director during the transition phase

Looking ahead, SHARE is committed to strengthening its infrastructure and expanding its impact. In 2025, SHARE joined forces with other leading European social science infrastructures—ESS, GGP, and GUIDE—in a collaborative project funded by the European Commission on the social aspects of the green transition. This new initiative will play an important role in shaping SHARE's future contributions to European research and policy.

Finally, I would like to thank all those who contribute to the continued success of SHARE: the dedicated SHARE staff, whose efforts form the foundation of our work; the scientific partner institutions and country teams, who are the core of SHARE's international significance; our funders for their unwavering support; and, most importantly, the respondents whose participation makes this study possible.

Thank you for your continued engagement with SHARE.



Dr. Dieta Lohmann
Chair of SHARE-ERIC

A handwritten signature in black ink, appearing to read 'Dieta Lohmann'.

FOREWORD FROM THE MANAGING DIRECTOR

Global events are unfolding at a dizzying pace – from key elections in Europe and the United States, to ongoing economic uncertainty. In the midst of these changes, our societies continue to age, social security systems are under increasing pressure, and climate change is picking up speed. SHARE seeks to contribute to navigating these complex challenges through data, research, and collaboration—while also managing its own transitions.

The year 2024 saw important milestones in the ongoing transformation of SHARE's central coordination, SHARE Germany, and the leadership of SHARE-ERIC. SHARE-ERIC completed its transition from Munich to the SHARE BERLIN Institute (SBI). The German country team has managed to secure funding for the coming years and is now also part of SBI. SHARE is now fully consolidated in Berlin as envisioned in the SBI founding concept.

I would like to thank Prof. Dr. Axel Börsch-Supan and Prof. Dr. Agnieszka Chłoń-Domińczak for their tireless efforts during this transition period in their roles as Managing Director and Acting Managing Director. I would also like to express my sincere thanks to the outgoing Management Board members Prof. Agar Brugiavini, Ph.D., Anne Laferrère, Ph.D., and Karen Andersen-Ranberg, Ph.D. I look forward to a successful collaboration with the new Management Board members Prof. Šime Smolić, Ph.D., Prof. Dr. Bella Strumin-skaya, and Prof. Giacomo Pasini, Ph.D., as well as with Prof. Dr. Jérôme Schoenmaeckers as the new Chair of the Assembly of Country Team Leaders. I am also looking forward to the future collaboration with Dr. Dieta Lohmann as the new Chair of SHARE-ERIC.

The different transition processes demanded significant dedication from everyone involved. I am grateful to our supporters, including the EU Commission, the German Ministry of Education and Research, and the German Research Foundation. I would also like to thank the central coordination team at SBI as well as the 28 country teams, without whom SHARE would not be possible. This year's meetings in Larnaca and Innsbruck provided invaluable opportunities to exchange new ideas, connect in person, and collaboratively discuss our future direction.

A key achievement in the past year was the successful renewal of the SBI's grant from the German Federal Ministry of Education and Research (BMBF¹), securing its operations through mid-2027. Furthermore, the SoGreen proposal submitted to the HORIZON Call "Next generation of scientific instrumentation, tools, methods, and advanced digital solutions for RIs (HORIZON-INFRA-2024-TECH-01)" was awarded. The goal of the SoGreen project is to enhance the capacities of the four leading social science infrastructures in Europe—SHARE, ESS, GGP and GUIDE—and generate valuable insights aimed at facilitating the study and evaluation of the social aspects of the green transition for different generations and socioeconomic groups across Europe.

¹ Now: Federal Ministry of Research, Technology and Space (BMFTR)

On the operational side, SHARE continued to advance its mission with two major milestones: the release of Wave 9 data and the launch of Wave 10 fieldwork. These are critical steps for the continuity of the study in 2025 and beyond. The conclusion of Wave 10 will mark the end of the first era of SHARE and pave the way for SHARE 2.0.

Our collaboration with the shareholder institutes of SBI also continues to grow through scientific events, helping to deepen SHARE's unique international and interdisciplinary character. By engaging with academic institutions and organizing events like the Gateway to Global Aging User Conference and the SBI Shareholder Conference, we continued in 2024 to create valuable platforms for collaboration and the exchange of ideas on shared challenges in ageing research. SHARE's continued active involvement in external networks, such as the Gateway to Global Aging, reflects our strong commitment to advancing international collaboration and data harmonization.



Prof. Dr. David Richter
Managing Director of SHARE-ERIC

A handwritten signature in blue ink, appearing to read "David Richter".

WHAT IS SHARE?

The Survey of Health, Ageing and Retirement in Europe

With the growing ageing population in Europe, well-founded evaluation of the effects of health, social, economic, and environmental policies on the lives of European citizens becomes ever more important. To meet this challenge, excellent scientific research based on excellent data is needed. SHARE, the Survey of Health, Ageing and Retirement in Europe, was created to deliver the data to conduct this research. In 2004, SHARE started interviewing people of the generation 50+. Since then, the same people have been interviewed every two years. As of Wave 9, the latest wave of data collection, SHARE has conducted around 616,000 in-depth interviews with 160,000 respondents. In general, specially trained interviewers collect the data on the participants' economic, social and health situation in computer-assisted personal interviews. This data is complemented by large-scale objective physical measures, such as grip strength, lung function and chair stand as well as blood-based biomarkers and an extensive measurement of cognition. Additionally, in the course of the COVID-19 pandemic, SHARE has conducted two Corona Surveys with telephone interviews. Thus, SHARE is the largest pan-European social science panel study providing internationally comparable longitudinal micro data, which allows insights in the fields of public health and socio-economic living conditions of European individuals, both for scientists and policy makers.

Research on a Global Scale

SHARE operates in all Member States of the European Union as well as in Switzerland and Israel. Strictly harmonised questionnaires guarantee cross-national

comparability. SHARE is also embedded in a global network of sister studies, enabling comparative research on a truly global scale.

Exploiting Europe's "Natural Observatory"

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

Deep Understanding of Crisis Effects and Challenges

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

consequences of the epidemiological containment decisions and the long-term effects of the COVID-19 pandemic due to its life-course and multidisciplinary approach. These synergies have been pooled in the SHARE-COVID19 research project, funded by Horizon 2020 and the Coronavirus Global Response.

SHARE-ERIC

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

Central Coordination

As of 1.1.2023, the SHARE central office has been relocated from Munich to its new home in Berlin, the SHARE BERLIN Institute. The SHARE BERLIN Institute is managed by Prof. Dr. David Richter, Director SHARE Infrastructure and International Coordinator of SHARE, and the commercial manager Sylvia Becker. Until the end of 2024, the seat of SHARE-ERIC remained in Munich. From 2025 on the seat of SHARE-ERIC will also be in Berlin.

Area Coordination

SHARE's multidisciplinary nature is reflected in the coordination of the questionnaire's various research fields.

Professor Guglielmo Weber, Ph.D., (University of Padua, Italy) is the coordinator for the *Income & Wealth* section, Karen Andersen-Ranberg, Ph.D., (University of Southern Denmark) for *Health*, Professor Florence Jusot (Université Paris-Dauphine, France) for *Health Care*, Professor Agar Brugiavini, Ph.D., (Ca' Foscari University of Venice, Italy) for *Work & Retirement* and Professor Martina Brandt (TU Dortmund University, Germany) for *Social Networks*.

Software Infrastructure

The software tools used by SHARE are provided by Centerdata, a research institute located on the Tilburg University campus. Centerdata not only programs the questionnaires, but also provides the software infrastructure for SHARE as well as the online data access for users.

Country Teams

In each participating country, a country team manages the national or regional data collection. Scientists from local research institutions lead a team of one to five members and ensure the same methodological standards in all SHARE countries. To conduct the survey, carefully selected survey agencies assist these teams with their professional knowhow and their highly trained interviewers.

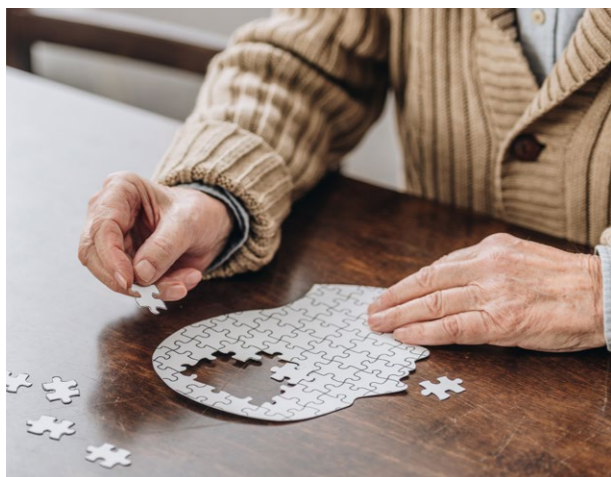
SHARE- HCAP

The SHARE-HCAP project aims to understand how different systems shape mental health and mortality in ageing populations. By examining the complex interplay of biomedical and socio-economic factors across the life course, the project aims to shed light on how these factors influence cognitive health in later life. By examining international variations in health and life circumstances, SHARE-HCAP will deepen our understanding of the pathway from healthy cognition to mild cognitive impairment and potentially dementia. As part of a global research effort, SHARE-HCAP will provide a harmonised set of cognitive measures to support further research in this area.

SHARE-HCAP

Bio-Medical and Socio-economic Determinants of Cognitive Decline

Alzheimer's disease and other dementias are leading causes of disease burden among people aged 75 years and over. The projected rise in dementia prevalence among ageing populations poses significant health and economic challenges. While there is currently no cure for dementia, its progression can potentially be slowed by identifying modifiable risk and protective factors for mild and severe cognitive impairment at an early stage. SHARE-HCAP enhances our understanding of how vastly different social, health, and long-term care systems affect mental health and mortality of ageing populations. The general aim of the SHARE-HCAP study is to leverage international variation in health and life circumstances across Europe to identify which interactions between biomedical and socio-economic conditions over the life course affect cognition in later life. Understanding life-course pathways from healthy cognition to mild cognitive impairment, and then,



possibly, to dementia, can support the development of early preventive interventions.

International Collaboration on Dementia Risk

SHARE-HCAP is part of the HCAP Network—an ongoing international research collaboration funded by the National Institute on Aging (NIA)—aimed at improving the measurement and understanding of dementia risk within longitudinal ageing studies worldwide. The network aims to harmonise methods and content across studies to enable meaningful cross-national comparisons. The wide variation in key policy variables, such as retirement age, can help identify pathways from early retirement, through inactivity and reduced social contact, to lower cognitive function, mediated by education, working environment, and other socio-economic factors over the life course.

The SHARE-HCAP study has been implemented in five SHARE countries (Czech Republic, Denmark, Germany, France, Italy). It was conducted in a stratified sample of SHARE panel respondents aged 65 years and older at the start of fieldwork (i.e. those born before 1 January 1957), who participated in at least one of the last three regular waves of SHARE and were eligible for an interview. This also includes panel respondents living in care or nursing homes, provided they had the capacity to consent to participation, or if a consultee (such as a family member)

agreed on their behalf that they would have wanted to participate. Potential sample members were then assigned to one of three groups, based on country-specific quantiles derived from immediate and delayed word recall trials, as well as self-reported doctor diagnosis of Alzheimer's disease or dementia:

1. severe cognitive impairment and/or a self-reported doctor diagnosis of Alzheimer's disease or dementia;
2. mild cognitive impairment with no reported doctor diagnosis of Alzheimer's disease or dementia;
3. normal cognition. In instances where two or more SHARE panel respondents from one household were eligible, only one respondent was selected for the study based on her/his cognition status – for example, when both partners had the same cognition status, one respondent was selected randomly; when partners differed, the respondent with poorer cognitive function was selected.

The Harmonized Cognitive Assessment Protocol

In the SHARE-HCAP study, an in-depth assessment of various cognitive domains – including memory, executive functioning, language and fluency, visuospatial skills, and orientation to time and place – was conducted according to the Harmonized Cognitive Assessment Protocol. Cognitive tests were administered to respondents in person using computer-assisted personal interviewing (CAPI), and included



well-known tests such as the Mini-Mental State Examination, several tests from the Consortium to Establish a Registry on Alzheimer's Disease (CERAD), and the Trail Making Test. Interviewers received comprehensive training to ensure standardised test administration. The mean interview length was 70 minutes across all participating countries.

Family and Friend Interviews to Support Cognitive Assessment

In addition to the HCAP interview, a Family and Friend Interview was conducted with a nominated family member or knowledgeable friend. They were asked to describe and evaluate the respondent's general health, report any changes in the respondent's cognitive functioning, and assess the respondent's ability to perform activities of daily living. While it was preferred that the person nominated by the HCAP respondent during the face-to-face interview

was not somebody employed to care for them, such as nursing or care home staff, this was allowed in cases where no other suitable nominee was available, and the employed person otherwise met the criteria (particularly how long they had known the respondent). Family and Friend interviews were either conducted by telephone using computer-assisted telephone interviewing (CATI) or in person using CAPI and took approximately 20 minutes to complete.

It was expected that contact and willingness to participate would be particularly difficult among those with low and medium cognitive functioning. These groups were therefore prioritised at the start of the fieldwork to allow sufficient time and effort to reach the target respondents. By the end of the fieldwork, the target of 500 SHARE-HCAP interviews per country was exceeded, bringing the total number of respondent interviews for the study to over 2,500.

SHARE-HCAP Release 1.0.0

SHARE published a preliminary Release 0 of HCAP in May 2024, providing users with a classification of cognition status based on the HRS-HCAP Manly et al. (2023) criteria. Meanwhile, preparations for SHARE-HCAP Release 1.0.0, including data cleaning and compilation of study documentation, were taking place, with the aim of publishing Release 1.0.0 in early 2025. From a data user perspective, the HCAP data – featuring detailed measures of cognition and early markers of degenerative brain diseases – holds high interest for all researchers in the fields of cognition, Alzheimer's disease, and dementia.

A Key Resource for Advancing Global Research

Moreover, HCAP data can be linked with the regular SHARE study data, and data from global sister studies, enabling a wide range of multidisciplinary research aimed at identifying potential links between cognitive health, significant life course events, and respondents' behaviours. In recent years, many other population-based studies of older adults all over the world have integrated HCAP as part of their core study. SHARE-HCAP is part of this initiative and will provide the research community with a rich, ex-ante harmonised set of cognitive measures to stimulate further research in this area.



SCIENTIFIC ASPECTS

SHARE'S COMMITMENT

The SHARE infrastructure is based on the trust of its respondents during and beyond the survey waves. The protection of the personal data of the survey participants is a matter of the utmost priority for SHARE and non-negotiable. SHARE promises to the participants that the data will not be used for anything but scientific purposes. Any other uses, such as a commercial use of the data, are therefore excluded as matter of principle.

AT A GLANCE

Overview of Our Scientific Achievements in the Past Year

SHARE Data Releases in 2024

SHARE released a substantial amount of new and updated data, including SHARE Release 9.0.0, which featured extensive updates to previous waves, new data from Wave 9, and innovations like child and interviewer identifiers. Additionally, the Accelerometry Raw Data Release 1.0.0, Dried Blood Spots Release 1.0.0, and the preliminary release of SHARE HCAP provided valuable resources for multidisciplinary research on health and cognitive function. In addition, the COVID Data Release and easySHARE were updated, combined, and made available to the scientific community. (pp. 24–25)

Gateway to Global Aging Release

SHARE strengthened its collaboration with the Gateway to Global Aging Data, a platform that harmonises ageing surveys worldwide. SHARE Central made the release of version G available through its Research Data Centre in October 2024. The harmonised dataset, derived from SHARE Release 9.0.0, enables researchers to link SHARE data with sister studies across multiple continents, greatly expanding opportunities for cross-country comparative research on ageing. (pp. 26)

Preload Preparation – Wave 10

Before starting fieldwork, preload datasets must be prepared for each country, defining the sample by including information on all households to be interviewed. For refreshment samples, the preload file contains basic demographic information from the population register (if available) and for panel households, it additionally contains selected data collected in previous waves. In 2024, SHARE pre-

pared preloads for the Wave 10 Field Rehearsal and Main fieldwork. After integrating country-specific requirements and external input, the final preload files were encrypted by Centerdata and sent to survey agencies for fieldwork – a process that takes several months due to its complexity. (pp. 27)

Advancing SHARE's Survey Infrastructure: Preparing for Multi-Mode Data Collection

In 2024, SHARE intensified the modernisation of its survey infrastructure in preparation for the transition to multi-modal data collection. To this end, software and survey design were optimised, new digital tools such as CaseCTRL and SurveyCTRL were developed, and existing systems such as SampleCTRL were improved. In addition, the migration to a new software language began with the transition of the end-of-life interview to QUEST, providing valuable insights for the full switch scheduled for Wave 11. (pp. 28–29)

Wave 10 Data collection

In early 2024, Field Rehearsal Training sessions in Berlin prepared agencies for the Wave 10 test run. The main data collection for Wave 10 began in October 2024, with 14 countries having initiated fieldwork by the end of the year, and Austria, Belgium, France, Germany, the Netherlands, Sweden, and Switzerland contacting over 50% of their panel households. Preliminary data from December 2024 showed over 13,000 completed interviews, with response rates steadily increasing, surpassing 30% in countries like Austria, Switzerland, the Netherlands, Sweden, and Slovenia. (pp. 30–31)

Record Linkage

SHARE promotes record linkage projects in its member countries, where survey data are linked with administrative records to enhance research quality. Several linked data releases were completed, including updates in Denmark, Finland, and Germany, and efforts continue to improve linkage methods, collaboration, and data infrastructure across Europe. (pp. 32)

Health Measurements in SHARE

In 2024, a major update enhanced the accessibility of accelerometer data, enabling detailed analysis of physical activity, while SHARE also released dried blood spot data for seven biomarkers to support research on health differences. Additionally, the SHARE-HCAP study investigates the impact of biomedical and socio-economic factors on cognitive decline, with its first data release available in February 2025. (pp. 34–35)

Methodology Volume

SHARE has released a new methodology volume for Wave 9. After disruptions caused by the COVID-19 pandemic, Wave 9 marked a return to face-to-face interviews, with nearly 70,000 interviews conducted across 27 European countries and Israel. The volume also details improvements in fieldwork monitoring, data quality measures, weighting strategies, and additional data sources like the SHARE Interviewer Survey and the Harmonized Cognitive Assessment Protocol (HCAP) project. (pp. 36)

SHARE Corona Survey Study Profile

Conducted as two telephone surveys in 2020 and 2021 across 27 European countries and Israel, the SHARE Corona Surveys enable researchers to study the effects of the pandemic and pandemic control measures. With over 48,000 interviews, the project provided valuable insights into health behaviour, healthcare, economics, and social relationships among the 50+ population. The SHARE Corona Survey Study Profile was published in August 2024. (pp. 37)

SHARE Users

In 2024, SHARE passed the mark of 20,000 registered SHARE users emphasising the importance of SHARE and its data for studying the effects of health, social, economic, and environmental policies over the life course. (pp. 38–47)

Conferences and User Workshops

SHARE conducted numerous national outreach activities to promote its data and research applications within the scientific community in 2024. Events were held across Europe and Israel, including symposiums, workshops, and conferences, covering topics such as SHARE data usage, statistical analysis, and policy implications, with notable gatherings in Belgium, Bulgaria, Estonia, Finland, France, Israel, Latvia, Lithuania, and Slovenia. These initiatives strengthened knowledge dissemination, enhanced data literacy, and fostered academic discussions on ageing-related research. (pp. 40–41)

User Support

The SHARE Central team at SBI supports users with updated documentation, an email helpdesk, and workshops to ensure effective use of SHARE data. In 2024, they managed around 450 inquiries, released key methodological documents, and engaged directly with researchers through training sessions and national workshops. (pp. 43)

User Feedback

Here are some examples of the positive user feedback we received in 2024. (pp. 44)

SHARE Publications

SHARE surpassed 4,000 publications! In December 2024, SHARE Central counted 4,177 publications with SHARE data. (pp. 48–59)

SHARE DATA RELEASES IN 2024

Providing Harmonised and Innovative Data

In 2024, SHARE published a significant amount of data output to the scientific community: SHARE Release 9.0.0, the Accelerometry Raw Data Release 1.0.0, SHARE Dries Blood Spots Release 1.0.0, SHARE HCAP (Harmonized Cognitive Assessment Protocol) preliminary Release 0, Dutch Mixed Mode Experiment Wave 6 and 7 Release 1.1.0, Combined Covid Data Release 9.0.0, and easySHARE Release 9.0.0.

SHARE Release 9.0.0 was published in March 2024 and contained a considerable update of previously available Waves 1 to 8, as well as the COVID-19 Surveys conducted during Waves 8 and 9. In addition, it marked the first release of data collected in SHARE's Wave 9. This major release comprised more than 300 datasets, with a total of 616,000 interviews from 160,000 respondents.

In the past year, the data underwent extensive processing, cleaning, and harmonisation to reflect the latest standards of sample and data quality. The work on Release 9.0.0 was mainly carried out by the SHARE Data Base Management (DBM) team. The DBM team administered and ran more than 1,000 programs and sub-programs over the raw data files to achieve longitudinal consistency across the SHARE sample. Moreover, a significant effort went into making the final data versions user friendly. This included the labelling, recoding and formatting of variables, harmonisation across waves, and the coding of open responses. The Country Team Operators (CTOs) provided crucial input throughout the process – for instance, identifying inconsistencies concerning IDs, gender or year of birth via so called “check files”,

and supporting the coding of national information into internationally comparable coding schemes.

Furthermore, the preparation of Release 9.0.0 included the development of **generated variable (GV) modules** to facilitate convenient and efficient data use. These modules provide users with ready-made variables such as the International Standard Classification of Education (ISCED), as well as derived measures that support more advanced analyses. Examples include physical health measures like IADL (instrumental activities of daily living), mental health measures (e.g. the Euro-D depression scale), an index measuring social integration, and many more. In addition, imputations and both cross-sectional and longitudinal weights were made available to users.

Release 9.0.0 also came with significant innovations and improvements. A new set of **child identifier variables** enable data users to link respondents' children across different waves and different modules for the first time. This development was the result of sustained effort by the DBM team over several years, in close collaboration with the CTOs, and finally bore fruit in 2024. Similarly, a new **interviewer identifier variable** was introduced, enabling data users to track interviewers across waves. Other valuable additions included the introduction of internationally comparable **ISCO occupation classification** for respondents' life history data collected in Wave 3. This work was extensively prepared in previous years, with support from the area team of Economics at the University of Venice.

Release 9.0.0 also featured a considerable enlargement of the Wave 8 sample and the first imputations for **SHARE's COVID-19 Survey 2**, conducted during Wave 9. In addition, SHARE delivered significant updates and new data for the Wave 8 Accelerometry Study. The release introduced new posture and activity recognition measures, providing data users with straightforward information based on state-of-the-art methodology. A separate **Release 1.0.0 of the Accelerometry Raw Data** was also made available – these huge data files are of high interest to experts researching in this field.

May 2024 saw the publication of two major releases. The first was the highly anticipated **Dried Blood Spots (DBS) Release 1.0.0**, comprising the largest standardised collection of blood samples ever gathered across multiple European countries. This release offers data on seven blood biomarkers for common age-related conditions such as cardiovascular diseases and diabetes. These biomarker data can be linked with the usual remit of SHARE survey data, allowing for a wide range of multidisciplinary research. Collected during the Wave 6 fieldwork, samples were taken from 27,000 SHARE respondents across 12 countries. A huge effort went into fieldwork, monitoring, logistics, organisation, and analysis of blood samples in specialised laboratories. To make this innovative release available to the scientific community, DBM collaborated with the DBS team at MEA-SHARE gGmbH, who oversee the DBS project.

The second release was the **preliminary Release 0 of SHARE HCAP (Harmonized Cognitive As-**

essment Protocol). This release allowed data users a first glimpse into the results from standardised cognitive tests in the HCAP study, aimed at assessing cognitive function and decline associated with age-related conditions such as Alzheimer's and other dementias. The HCAP study was conducted during Wave 9 field work with a selected subsample of over 2,500 respondents from five countries. These data can also be linked with regular SHARE survey data. DBM took over sample cleaning and large parts of the data processing, working in collaboration with the HCAP team at MEA-SHARE gGmbH to make this release available.

Finally, there were several other releases and updates for additional data sets. SHARE provided **Release 1.1.0 of the Dutch Mixed Mode Experiment** from Waves 6 and 7 in May 2024 – an update featuring additions and improvements to the existing data sets. In June 2024, SHARE published the **Combined Covid Data Release 9.0.0**. This release is based on Release 9.0.0 and provides a user-friendly data set derived from the two SHARE COVID-19 Surveys conducted between Waves 8 and 9.

To conclude this round of releases, **easySHARE Release 9.0.0** was also published in June 2024. The easySHARE data aims at educating students and scientists in training, to help them become acquainted with SHARE data and to attract new data users. It includes a simplified panel dataset, documentation, and syntax examples for straightforward use. Derived from the main Release 9.0.0 survey data, it can also be linked with the full SHARE dataset.

GATEWAY TO GLOBAL AGING RELEASE

Providing Harmonised Data

In 2024, SHARE intensified its cooperation with **Gateway to Global Aging Data** – a huge data and information platform developed to support longitudinal and cross-country analyses on ageing, with the ambitious goal of harmonising ageing-related surveys worldwide. This marks the first time that SHARE has assisted with the data dissemination of an external data provider. So far, sixteen ageing surveys are part of the Gateway to Global Aging Data, with the **Health and Retirement Study (HRS)** in the United States being the oldest. Apart from SHARE and HRS, other key contributors include **MHAS** in Mexico, **ELSA** in England, **KLoSA** in Korea, **JSTAR** in Japan, **CHARLS** in China, **LASI** in India, and many more. These sister studies share common characteristics including being population-representative of older adults, longitudinal in design, multidisciplinary in scope, and using harmonised instruments. They also incorporate enhanced economic data and integrated biomarkers.

The Gateway to Global Aging Data platform uses SHARE data as one of its key inputs and provides the derived harmonised data output to its users. SHARE actively supports the Gateway by agreeing

to make their harmonised datasets available through the SHARE Research Data Centre. The coordination of this collaboration took place throughout 2024, culminating in the release of Gateway to Global Aging Data Release Version G in October 2024 to all registered SHARE users. Moreover, SHARE-ERIC hosted a dedicated Gateway to Global Aging workshop in Berlin in November 2024.

Responsibility for the data and related content lies with the Gateway to Global Aging Data. Gateway to Global Aging Data Release Version G is derived from and compatible with SHARE Release 9.0.0. It comprises four large generated datasets: SHARE regular panel data, SHARELIFE life history data, end-of-life data, and SHARE-COVID-19 data. These datasets can be linked with regular SHARE survey data and combined with harmonised datasets from sister studies around the world, considerably broadening the possibilities for researchers. This integration allows for an even wider range of cross-national comparisons and comparative ageing research across regions including the United States, Latin America, Asia, Europe and South Africa.

PRELOAD PREPARATION – WAVE 10

Compilation of Panel and Refreshment Samples Before Fieldwork

General Information

Before starting fieldwork, preload datasets must be prepared for all participating countries. These preload datasets define the sample by containing information on all households that should be interviewed – both panel households (from previous waves) and refreshment samples (newly selected respondents).

For refreshment samples, the preload file contains only basic demographic information from the population register (if available), as well as information on wave- and/or country-specific modules, such as record linkage or drop-off questionnaires (supplementary country-specific paper-and-pencil surveys conducted in a subset of countries). For households that participated in a previous wave, the preload database additionally includes information on household composition, eligibility status of all household members, and selected content information (e.g., details about children), which are integrated from data collected in previous waves.

Based on the preload, Survey Agencies assign households to interviewers. The preload then steers the software on the interviewers' laptops, e.g., when asking about changes in household composition, preloaded information is displayed to facilitate the interview.

Wave 10

In 2024, preload datasets for both the Wave 10 Field Rehearsal (test run) and Wave 10 Main Fieldwork were prepared. Following our usual procedure, refreshment samples were prepared by the Survey Agencies and delivered to the SHARE Central Sampling Team, who checked the data and passed them to the Database Management Team (DBM). Panel preloads were prepared by the DBM based on data from previous waves. The first step of this process was to cross-check current sample information with the Survey Agencies, who informed SHARE Central about households that should not be part of the sample (e.g. households that have moved abroad, lacked contact information, or declined further participation). The Country Teams provided information on wave- and/or country-specific modules, such as record linkage or drop-off module requirements. After collecting this input, the external information was taken into account when preparing the panel preload for each country separately applying specific internal rules and procedures for eligibility and sample cleaning. As a last step, DBM combined the panel and refreshment samples and provided the final preload files to the programmers at Centerdata, who encrypted the files and distributed them to the Survey Agencies for fieldwork implementation. Due to the country-specific nature of the process– e.g. collaborating with all Survey Agencies and Country Teams and compiling country-specific datasets – the preload preparation takes several months to complete.

ADVANCING SHARE'S SURVEY INFRASTRUCTURE: PREPARING FOR MULTI-MODE DATA COLLECTION

Enhancing Survey Tools to Meet Future Challenges

In 2024, SHARE intensified its efforts to modernize survey infrastructure and prepare for multi-mode data collection. The evolving survey landscape, including interviewer availability, costs, and response rates, has made these advancements increasingly relevant. To support the long-term sustainability of the study with flexible survey methodologies while maintaining high data quality, SHARE has focused on optimizing both software and survey design. In collaboration with Centerdata and building on past innovations, we enhanced our survey tools and strengthened the software architecture. This also involved laying the groundwork for a new software component to support online surveys, enhancing flexibility, efficiency, and adaptability in survey management.

One of the key advancements was the initiation of a web-based CaseCTRL development. This new version aims to provide greater flexibility, enabling quicker updates and changes. Additionally, the transition to QUEST programming for CaseCTRL and its features has continued, ensuring a more streamlined and adaptable system for upcoming waves. Enhancements were also introduced to SampleCTRL, where agencies now have improved capabilities to supervise delete requests more efficiently. This added oversight minimizes the risk of false inputs and enhances

data accuracy. For Wave 11, we identified key requirements and developed conceptual designs for both CaseCTRL and SampleCTRL. These efforts are shaping the future of survey management, ensuring improved usability and functionality for interviewers and administrators alike.

A major structural change was also initiated in the way data is captured. Data transfer will shift from the household level to the individual level, reducing panel attrition while providing increased flexibility in data collection and management.

Alongside Wave 10 fieldwork preparations, SHARE developed the **Self-Completion Questionnaire experiment** in 2024. This experiment marks a key step toward implementing multi-mode data collection, enabling SHARE to adapt to evolving technologies and respondent needs and preferences. It is essential for understanding the willingness and ability of the SHARE target group to participate in self-completion surveys. By randomly assigning respondents to the same questionnaire either in online or paper-and-pencil mode, we aim to assess their responsiveness and gain insights into mode preferences and participation behaviour. To support this, we developed **SurveyCTRL**, a software tool specifically designed for managing surveys in **CAWI**

(Computer-Assisted Web Interviewing) mode - an important long-term investment as multi-mode data collection becomes an integral part of SHARE's survey design.

Further steps were taken in 2024 to prepare SHARE for a multi-mode future, requiring a transition to a new software language to support questionnaires across different modes. With the full migration planned for 2025, significant groundwork was laid in 2024. As a key step in this process, the **End-of-Life interview** was migrated to **QUEST** already for Wave 10 as a pilot project. This served as a test case to evaluate the impact on data quality, operational workflows, and the feasibility of transitioning survey instruments to a new environment. Key aspects of the evaluation included adapting the layout, transferring translations, and ensuring data comparability with previous waves. The project was a success, providing valuable insights that now guide the migration of the core SHARE interview to **QUEST** in **Wave 11**.

On top, questionnaire innovations were introduced in Wave 10 with a renewed IT module and Online Survey module, addressing critical uncertainties about the SHARE target population's ability and self-reported willingness to participate in web-based

surveys. These modules aim to fill knowledge gaps on internet access within our target population, usage frequency, familiarity with online platforms, and respondents' willingness to take part in an online survey. Additionally, they capture the barriers that may prevent participation. By incorporating an extended IT and OS module in Wave 10, SHARE is gathering valuable insights that will allow us to make informed decisions about the future multi-mode survey strategies.

With these advancements, SHARE is well-positioned to navigate the evolving survey landscape, ensuring a seamless transition to multi-mode data collection while maintaining high data quality and efficiency. The groundwork laid in 2024 provides a strong foundation for future innovations, allowing SHARE to adapt to technological developments, respondent needs, and methodological challenges with confidence.

WAVE 10 DATA COLLECTION

Field Rehearsal and Main Data Collection

2024 began with Field Rehearsal Training sessions in February in Berlin, where agencies from all participating countries received briefings, collaborated in group exercises, and participated in mock interviews to prepare for the test run. Unlike the Wave 10 Internal Pretest in 2023, which involved only country teams and SHARE Central but no survey agencies, this was the first time agencies were included for Wave 10. The Internal Pretest experiment was conducted primarily to save time and enable quicker implementation of in-between-wave surveys, as outlined in the SHARE 2.0 concept. Although there was a higher risk of overlooking software bugs in the reduced setup, no major issues were found dur-

ing Wave 10 Field Rehearsal, leading to a positive evaluation of the Internal Pretest concept.

For the main data collection of Wave 10, the training sessions for all agencies were held in September 2024 in Munich. The fieldwork cycle for Wave 10 of the Survey of Health, Ageing and Retirement in Europe officially started in October 2024 and is scheduled until 2025. While several countries successfully started their fieldwork in 2024, others were still in the preparatory phase at the end of 2024. The first countries to start fieldwork were Austria, Belgium, the Czech Republic, France, the Netherlands, Slovenia and Sweden. By the end of 2024, a total of 14

countries had already initiated fieldwork.

This section provides an overview of the progress of the fieldwork, preliminary response rates and the percentage of households attempted from the first weeks of fieldwork.

The first figure shows the proportion of households in the longitudinal sample for which a contact attempt was made. This includes both cases where an interviewer attempted contact but was unsuccessful and cases where contact was successful. This measure reflects the fieldwork effort to reach respondents and varies according to interviewer capacity and country-specific factors. By the end of 2024, Austria, Belgium (NL), France, Germany, the Netherlands, Sweden and Switzerland had contacted more than 50% of their panel households.

longitudinal sample, calculated as the number of completed interviews divided by the total number of eligible individuals within households. Due to the gradual start of fieldwork in each country, response rates still vary at this stage. Preliminary data from countries where fieldwork was underway in December 2024 indicate a total of more than 13,000 completed interviews. As the figure shows, there is a clear upward trend in response rates as fieldwork progresses. Countries such as Austria, Switzerland, the Netherlands, Sweden and Slovenia had already achieved a response rate of more than 30%.

As fieldwork progresses, household response and attempt rates are being continuously monitored and evaluated. Final rates and fieldwork statistics will be compiled once data collection is complete and the scientific release data are available, allowing a comprehensive assessment of the effectiveness of fieldwork in this wave of SHARE.

Figure 1: Fraction of panel households with contact attempts by country over time
Source: Preliminary data, SHARE Wave 10

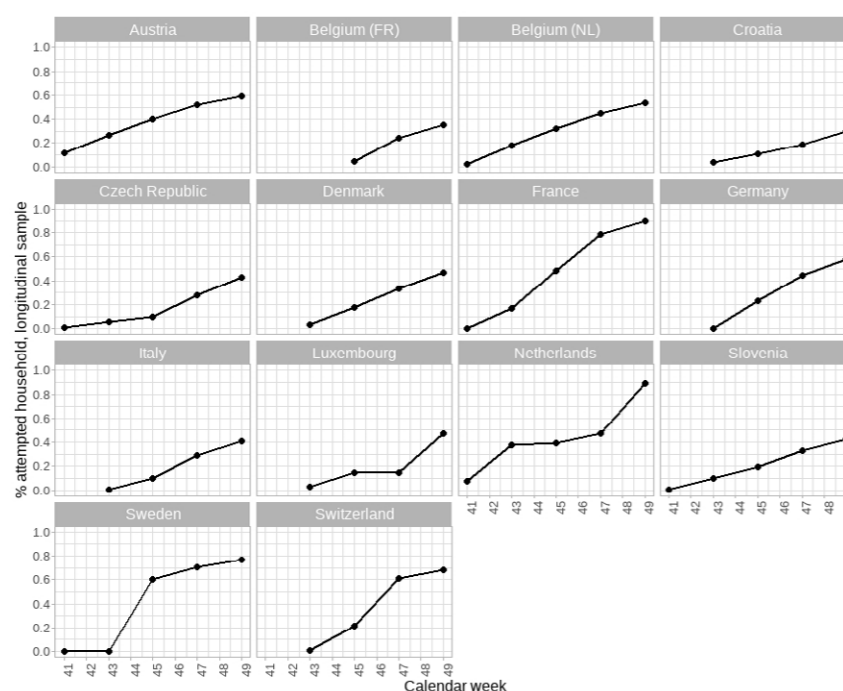
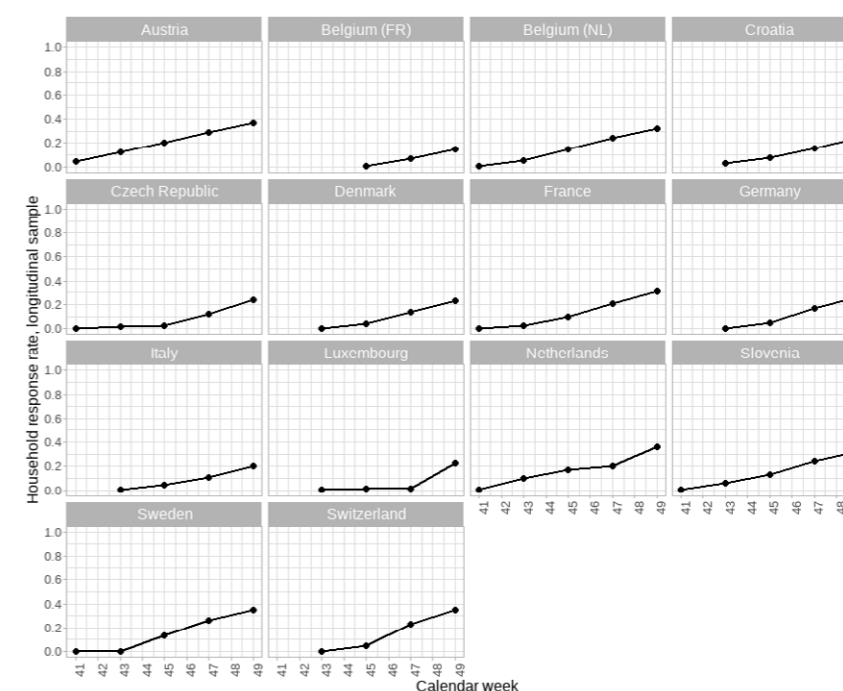


Figure 2: Household response rate in panel sample by country over time
Source: Preliminary data, SHARE Wave 10



RECORD LINKAGE IN SHARE

Linking Survey Data to Administrative Data in Different Countries

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

Fieldwork

Fieldwork for Wave 10 main started in October 2024. The questionnaire contained again a special module for collecting linkage consent with individualized routing and question design for all countries taking part in linkage. Fieldwork preparations also included the adaptation of the informed consent materials for respondents. In parallel, early step preparations for Wave 11 already started. This included first talks with interested Country Teams about the feasibility and design of possible linkage projects in new countries.

Linked Data Releases

During the reporting period, three data releases of linked data were completed. In May 2024, an updated data release of the Danish **REGLINK-SHAREDK** project was published. The new release of the Danish record linkage project includes survey data of Danish SHARE respondents of Waves 1-9 who gave their consent for linkage in Wave 8. SHARE data is linked to register data from Statistics Denmark and the Danish Health Data Authority.

The first release of linked data in Finland was completed in June 2024. **REGLINK-SHAREFI** stands for the direct linkage of Finnish SHARE data with register data from Statistics Finland, the Finnish Centre for Pensions and the Finnish Social Insurance Institution (Kela). This data version of the Finnish record linkage project includes survey data of Finnish SHARE respondents of Waves 7-9 who gave their consent for linkage in Wave 8 or Wave 9.

A new version of the German linkage **SHARE-RV** was released in October 2024. This version is based on SHARE Release 9-0-0, contains data for respondents who consented between Wave 3 and Wave 9 and provides administrative data up to 2022.

Researchers who are registered users of SHARE, can apply for access to the linked data, too.

Outreach and Perspective

Besides infrastructural developments for record linkage in SHARE, another focus was on expanding presentation and methodological research related to linkage. A research poster was created to present progress and achievements at conferences and to inform the research community about data availability. Furthermore, the new SHARE-CoRaL research project is dedicated to methodological questions related to obtaining consent for linkage in the international context of SHARE. In addition, opportunities for collaboration with other European panel studies are being explored regarding the development of common data infrastructures.



HEALTH MEASURES IN SHARE

Advancements in SHARE's Objective Health Behaviour Data

While SHARE data primarily consists of self-reported information from respondents, objective health measures based on standardized assessments and test batteries are also essential. Notable examples include accelerometer data, grip strength, walking speed, and dried blood spots which enable cross-country comparisons and help refine self-reported health data. In 2024, SHARE achieved significant advancements in making objective health data available.

Accelerometer Study

To measure the physical activity of SHARE respondents, an accelerometer study was conducted in the eighth survey wave (2019/2020) across 10 countries. A subsample of participants was asked to wear an accelerometer on their thigh for seven consecutive days. Variables derived from the acceleration measurements have been available to researchers since 2021.

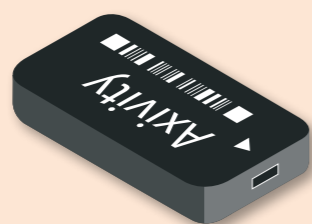
In 2024, a major update was introduced with the release of SHARE data version 9.0.0, which significantly enhanced the accessibility and usability of the measured physical activity data. On the one hand, the update made the data easier to use by improving the generated modules. Accelerometer measurements were processed into user-friendly variables using ActiPASS, a software tool designed

for activity pattern assessment with thigh-worn accelerometers. This update provides metrics for postures (e.g., sitting, lying, standing, walking) and activity intensity levels (sedentary, light, and intense activity), along with step counts. On the other hand, raw sensor data was made available for users with expert knowledge. This allows researchers to analyse high-frequency sensor data using the software and algorithms of their choice, enabling more advanced and customised analyses.

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

SHARE Dried Blood Spots

In Wave 6, SHARE introduced the collection of Dried Blood Spot (DBS) samples as an additional objective health measure. The project aims to enhance our understanding of cross-national health differences and their underlying causes, particularly by examining variations in health care systems, health behaviors, and life histories. A key challenge in such comparisons is ensuring consistent health measurements



SHARE HCAP

Think-Recognise-Remember: the Health Study

that are not affected by differences in data collection and reporting methods.

Approximately 25,000 samples from respondents in 12 countries were available for analysis of some or all of the targeted biomarkers. Routine blood marker analyses were conducted in two phases: the first batch in 2017/2018 and the second in 2020/2021. One of the main objectives is to harmonise the SHARE DBS assay data with similar data from ELSA VB and HRS DBS/VB. In May 2024, SHARE Central at SBI released DBS data for seven biomarkers. Registered SHARE users can download the data from the SHARE Research Data Center.

SHARE-HCAP

HCAP stands for Harmonized Cognitive Assessment Protocol. The general aim of SHARE-HCAP is to exploit the international variation of health and

life circumstances in Continental Europe to identify which interactions of bio-medical and socio-economic conditions over the life course affect cognition in later life. The understanding of such life-course pathways to first mild cognitive impairment and then, possibly, dementia, should help in developing preventive early interventions. The SHARE-HCAP data collection was finalized in November 2022. The resulting SHARE-HCAP data comprises data from more than 2,600 respondents in the Czech Republic, Denmark, France, Germany and Italy. SHARE-HCAP 1 Release 1.0.0 is available since February 2025. More detailed information on HCAP is available in chapter 2 (pp. 15–19).



RELEASE OF SHARE WAVE 9 METHODOLOGY VOLUME

From the SHARE Corona Survey 2 to the SHARE Main Wave 9 Interview

SHARE has published a new methodology volume for Wave 9. This volume documents the main questionnaire innovations, methodological advances and new procedures introduced during the ninth wave of SHARE. Compared to the previous wave, which was characterised by the discontinuation of the Wave 8 face-to-face fieldwork due to the outbreak of the Covid-19 pandemic and the switch to the first SHARE Corona Survey conducted by telephone in summer 2020, the ninth wave of SHARE was characterised by the return to regular face-to-face interviews after the second SHARE Corona Survey in 2021. While the pandemic was still gripping the world at the time of the second wave of the SHARE Corona Survey in summer 2021, it was still not completely over when Wave 9 began in late 2021, and government responses to the situation varied widely across the countries participating in SHARE. This is also the reason why fieldwork in some countries lasted until early September 2022. Despite these complicated circumstances, the fieldwork performance in many countries and overall was remarkable. All survey agencies together managed to collect around 50,000 interviews in the second SHARE Corona survey and almost 70,000 interviews in the regular fieldwork of Wave 9, with the help of around 2,000 interviewers in 27 European countries and Israel.

Against this background, the volume contains chapters on various aspects of the survey life cycle, such as sampling, questionnaire development and major software innovations in SHARE Wave 9. Adjustments to fieldwork monitoring and back-checking procedures to ensure data quality in the second SHARE Corona Survey and the regular SHARE Wave 9 are also described. It also outlines the weighting and imputation strategies used to deal with problems of unit non-response, sample attrition and item non-response, and describes additional data that enhance the responses collected from our respondents in SHARE. These include the SHARE Interviewer Survey, which greatly enhances the analytical potential of the SHARE microdata, and the Harmonised Cognitive Assessment Protocol (HCAP) project, which will help us to better understand different pathways of cognitive ageing while harmonising our data with other ageing studies around the world.

Literature:

Bergmann, M., Wagner, M., and A. Börsch-Supan (2024). SHARE Wave 9 Methodology Volume. From the SHARE Corona Survey 2 to the SHARE Main Wave 9 Interview. Munich: SHARE-ERIC. doi: 10.6103/mv.w09

PUBLICATION OF THE SHARE CORONA SURVEYS STUDY PROFILE

The outbreak of the COVID-19 pandemic has changed our lives and had many undesirable consequences. For example, the rules and policies introduced to control the spread of the virus have led to a deep economic recession. Social contacts and interactions have been disrupted, and people have generally been reluctant to visit health centres, the long-term consequences of which are not yet fully understood. In this context, the EU-funded SHARE-COVID19 project (Grant No. 101015924) adopted a transdisciplinary and internationally comparative approach, using data sources from the SHARE research infrastructure. The aim was to formulate recommendations to make European societies more resilient, to effectively protect the most vulnerable population of people older than 50 years and to optimise future epidemic control measures. The project started on 1 November 2020 and ended on 30 June 2024.

Implemented as two telephone interviews in the summers of 2020 and 2021 in 27 European countries and Israel, the SHARE Corona Surveys present a great advantage by their integration into the longitudinal, multidisciplinary and ex-ante harmonised design of the SHARE study. This integration enables researchers to trace changes from the pre-pandemic period, through the different stages of the pandemic, and the post-pandemic situation. The study profile, published in Longitudinal and Life Course Studies,

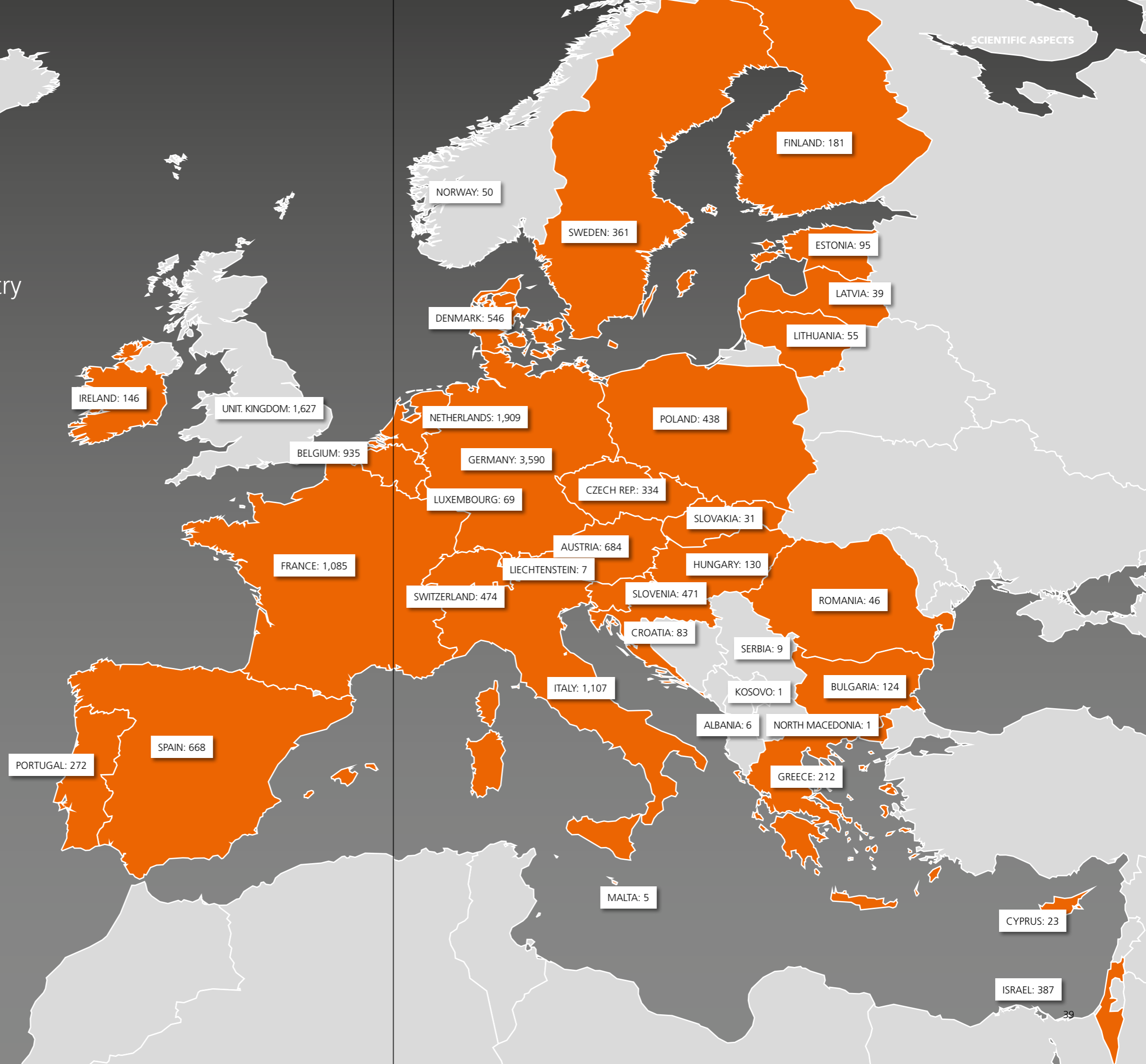
delineates the research aims and how the two Corona Surveys are integrated within the overarching SHARE design. It presents the principal design characteristics of the SHARE Corona Surveys in accordance with the survey life cycle, commencing with information pertaining to procurement, contracting, funding, ethics, and data protection and sampling. This is followed by details regarding instrument design, translations, questionnaire content, and interviewer training. Finally, the description encompasses fieldwork, panel care, and data processing. Focusing on subjects including health behaviour, healthcare, economics and social relationships, the balanced panel sample of the two SHARE Corona Surveys comprises over 48,000 interviews and provides valuable insights into how the 50+ population coped with the COVID-19 pandemic. The experience of implementing the SHARE Corona Surveys also offers insights into the use of agile project management methods for large survey infrastructures and the transition towards a multi-mode design in an ongoing panel data collection project.

Literature:

Bergmann, M., Wagner, M., Yilmaz, Y., Axt, K., Kronsnabl, J., Pettinicchi, Y., Schmidutz, D., Schuller, K., Stuck, S., & Börsch-Supan, A. (2024). SHARE Corona Surveys: study profile. Longitudinal and Life Course Studies, 15(4), 506-525. doi: <https://doi.org/10.1332/17579597Y2024D000000027>

SHARE USERS

Number of users per country



COMMUNITY OF SHARE USERS IS GROWING

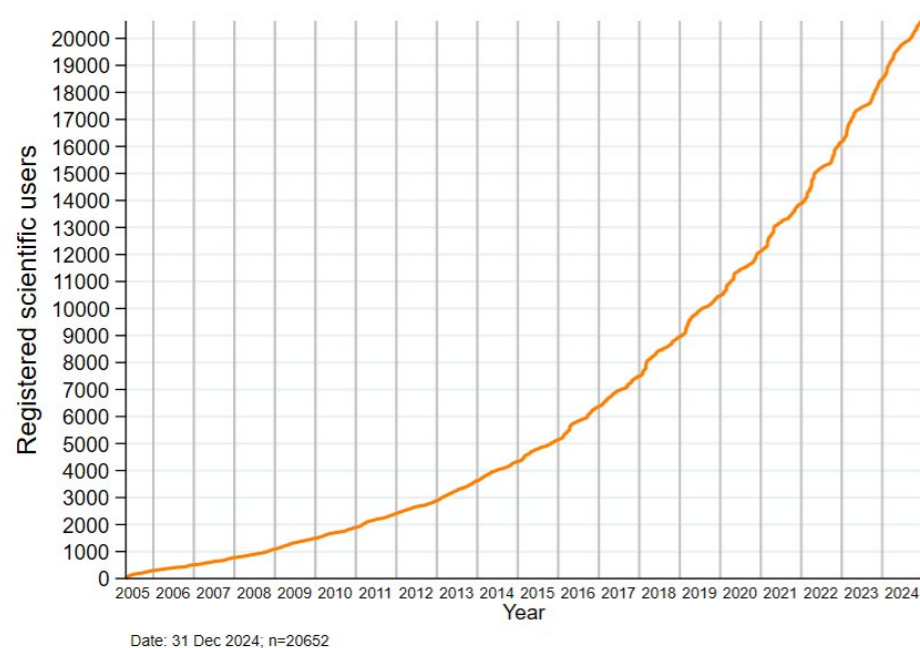
More than 20,000 Registered SHARE Users

In 2024, SHARE passed the mark of 20,000 registered SHARE users, with a total of 20,652 user registrations by the end of the year. Once again, the number of new user registrations remained constant at a high level, increasing by 2,183 in 2024.

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

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

In 2024, SHARE users came from 91 countries, bringing perspectives from different scientific disciplines, societies, and cultures. The country with the highest number of registered users is Germany with more than 3,900 users. It is followed by the Netherlands with more than 2,100 users and the United Kingdom with more than 1,700 users. With over 1,100 registered users, the USA is the country with the highest number of SHARE users outside of Europe.



SHARE Data Users

NATIONAL SCIENTIFIC DISSEMINATION

Country-Level Efforts to Increase SHARE's Scientific Impact

In 2024, numerous outreach activities were conducted on the national level to promote the Survey of Health, Ageing and Retirement in Europe (SHARE) to the scientific community.

In Belgium, the country teams organised two major events: a symposium on SHARE-based research and a user workshop, both in Brussels. These events attracted 38 and 40 participants, respectively, and focused on research applications of SHARE data. Similarly, SHARE Bulgaria hosted two seminars at Sofia University St. Kliment Ohridski. The first focused on working with SHARE COVID-19 survey data, the second introduced participants to easySHARE and inferential statistical analysis. The Estonian team organised a two-session seminar on quantitative research methods based on SHARE data. The sessions were designed for master's students and covered the structure of the SHARE survey and key research findings.

Several significant events were held in Helsinki, Finland. The SHARE Baltic Sea Conference focused on health, ageing, and retirement, attracting approximately 55 participants, who discussed scientific issues and policy implications. Another seminar organised in collaboration with Kela, the Social Insurance Institution of Finland, informed about 60 participants about the use of SHARE data and register-linked research, with a particular focus on family carers.

SHARE France hosted multiple outreach events at the Université Paris-Dauphine, such as the SHARE-ESS Scientific Day celebrating 20 years of major European surveys with more than 50 participants. This event featured research presentations as well as discussions on methodological advancements and public policy implications. In addition to this and other events, SHARE France was represented at a Franco-Chinese symposium in Suzhou, China, and delivered sessions on SHARE data as part of master's programmes at the Universities of Paris-Est Créteil and of Lille.

Israel also contributed to SHARE outreach. At the biannual Israel Gerontological Society Conference, a session chaired by Professor Sharon Shiovitz-Ezra presented findings from SHARE data, drawing an audience of approximately 50 participants. Among other events, a researcher-focused workshop was conducted online for 26 gerontology researchers affiliated with the Minerva Center on Intersectionality in Aging at the University of Haifa. This session provided insights into SHARE data and its applications in academic research. In Italy, the universities of Padova and Venice co-organized the Summer Institute on Ageing for about 60 early-career researchers as well as the General Meeting Age-IT, a scientific conference. Both events took place in Venice. Furthermore, Professor Guglielmo Weber presented SHARE's research potential at the FOSSR Days in Rome.

In Latvia, an introductory SHARE Data User Workshop was held in Riga, with approximately 25 participants. Meanwhile, Lithuania organised two major scientific outreach events. The “Silver Society Forum”, a seminar held at Vilnius University, focused on ageing, ageism, and digital inclusion. The event attracted 172 registered participants. Additionally, a series of online workshops on “Analysis of SHARE Data” covered survey methodology, data structure, and statistical applications. Events organised in Slovenia

include an open session at the University of Ljubljana, introducing the SHARE survey and its publicly accessible database to senior researchers.

The extensive engagement across multiple country teams demonstrates their extensive efforts to disseminate knowledge and enhanced data literacy and fostered academic discussions on ageing-related research.



USER SUPPORT

Facilitation of Data Usage

The SHARE Central team at SBI has implemented various support activities to assist both new and experienced SHARE users.

First, maintaining clear and continuously updated documentation for all SHARE datasets is crucial. Given the richness and complexity of the data, this ensures that researchers from all over the world and across diverse scientific disciplines can work effectively with SHARE. Major data releases, such as Release 9.0.0, require extensive updates to key documentation files, including the SHARE Release Guide, the Scales and Multi-Item Indicators Manual, and the Data & Documentation Tool (DDT). In spring 2024, there was the publication of SHARE Wave 9 Methodology which explores detailed significant innovations in the questionnaire, methodological advancements, and new procedures introduced in Wave 9 for the SHARE Corona Survey 2 as well as for the SHARE Main Wave 9 Interview.

Second, the SHARE User Support Team manages an e-mail helpdesk (info@share-project.org), where users can submit all types of SHARE-related inquiries. The team ensures timely responses, providing additional documentation, clarifying data structure and content, assisting prospective users with data access procedures, tracking SHARE-based publications, and, when necessary, forwarding specialized requests to country teams or experts in weights and imputations. In 2024, the team handled approximately 450 user requests—more than one per day.

Finally, direct engagement with researchers through user workshops plays a key role in SHARE user support. These workshops introduce new users to the data and offer training for both novice and experienced researchers. When possible, the SHARE Central team also sends topic experts to national user workshops organized by the SHARE Country Teams, as was the case at the Latvian user workshop in Riga in February 2024.

FEEDBACK FROM SHARE USERS 2024

Active Exchange with the SHARE User Community



”

We are happy to be able to contribute and spread the word about the data (I am currently in the US and busy praising the SHARE data :-)).

”

Dear SHARE, Thank you very much for your data.

”

Also, I would like to personally thank everybody involved in the SHARE project for the opportunity to work with this amazing dataset. It was definitely a very valuable experience for me as a quantitative social scientist.

The SHARE team takes the opportunity to say: THANK YOU to all SHARE users for keeping in touch and using SHARE data for their research!

Users after receiving user support:

”

Great, thank you very much for your swift reply. That is very helpful.

”

Thank you for your detailed clarification (...). This is very helpful, and I greatly appreciate your prompt and thorough response.

”

Thank you for your helpful response and the information regarding the SHARE data. I appreciate your guidance and the provided resources.

”

Many thanks again for your great supports.



SHARE USERS

ALL OVER THE WORLD



SHARE-BASED JOURNAL PUBLICATIONS 2024

A–D

Agapitos, M., G. Muniz-Terrera and A. Robitaille (2024): Older caregivers' depressive symptomatology over time: evidence from the Survey of Health, Ageing and Retirement in Europe. *European Journal of Ageing* 21(21). DOI: <https://doi.org/10.1007/s10433-024>.

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PO LICY IMP ACT

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

POLICY IMPACT

Evidence-based Policymaking with SHARE

“As life expectancy increases, so do the complexities of ageing. The Survey of Health, Ageing and Retirement in Europe provides invaluable data and insights into the socio-economic challenges of ageing societies, enabling policymakers and researchers to better ensure financial security, healthcare sustainability, and social inclusion for older generations.”, says SHARE-ERIC Managing Director, Prof. Dr. David Richter

Population ageing continues to challenge our future societies – impacting healthcare systems, pensions, labour markets, and social cohesion. As demographic trends accelerate, understanding the dynamics of ageing has become more critical than ever for shaping resilient and inclusive policies.

SHARE supports this effort by providing high-quality, longitudinal data on the economic, social, and health conditions of people aged 50 and older across 27 European countries and Israel. This evidence base enables policymakers to address pressing socio-economic and public health challenges with confidence and scientific grounding.

Since its inception, SHARE has contributed to improving the living conditions of older adults through its commitment to data-driven insights.

Below are selected examples of how SHARE data has informed evidence-based policymaking at national and international levels.

ON THE NATIONAL LEVEL

Austria

National Report on Healthy Ageing



The Austrian National Public Health Institute (Gesundheit Österreich GmbH, GÖG) published a scientific report “Vision of the Future: Ageing in a Society in Transition” (“Zukunftsvisionen: Altern in einer Gesellschaft im Wandel”) based on SHARE data analysing the determinants of health ageing. The report was commissioned by the Federal Ministry of Labour, Social Affairs, Health, Care and Consumer Protection (BMASGPK) and published in December 2024.

Cyprus

Policy Outreach at the Ministry Level



Nikolaos Theodoropoulos, the Country Team Leader of SHARE-Cyprus, held presentations describing SHARE data, its potential for research and policymaking, and opportunities for funding at the Ministry of Health, the Ministry of Labour and Social Insurance, and the Technological University of Cyprus.

Israel

Reporting and Policy Engagement



In June 2024, the Country Team briefed the Israel Central Bureau of Statistics (ICBS) to improve the accuracy and validity of the report preparation. This briefing included explanations on SHARE data collection process and the data collected.

The second “Indicators for Optimal Aging in Israel” report was released by the ICBS in July 2024. This biennial report includes multiple indicators from SHARE Waves 8 and 9 and a comparison between Israel and the other SHARE countries. This report will be used to guide future evidence-based policies about older adults and their needs. It is also an important information source for different stakeholders.

Prof. Sharon Shiovitz-Ezra chaired, and presented at, the biennial conference of the Israel Gerontological Society titled “Selected findings from the Health, Aging and Retirement Survey in Europe and Israel: SHARE Survey”. One of the presentations assessed the impact of the reform of oral and dental healthcare for the elderly on the use of dental services. The findings showed the reform was a success and higher rates of dental services use among older adults. The conference was held on the September 12th, 2024 at the International Convention Center in Jerusalem.

Latvia

Informing Policy Reform



SHARE data were used to prepare a report and policy recommendations for the Ministry of Welfare of the Republic of Latvia to develop a sustainable long-term social care financing model. The internal report aimed to review and improve the financing arrangements for long-term social care services, including enhanced support for informal carers.

Lithuania



Engaging Policymakers and the General Public

The Lithuanian Country Team held a series of meetings introducing SHARE to representatives of the Ministry of Health, the Ministry of Economy and Innovation, the Ministry of Social Security and Labour, and the Government Strategic Analysis Center (STRATA). The meetings sought to demonstrate the benefits of SHARE's research infrastructure for political analysis and forecasting and introduced policymakers to the key indicators available in SHARE data. The meeting series aimed to inform the future of Lithuania in SHARE and continued support from the national bodies.

Furthermore, Prof. Antanas Kairys, the Country Team leader of SHARE-Lithuania, delivered a presentation at the "Age-Friendly Communities" conference organized by the Ministry of Social Security and Labour of the Republic Lithuania. The conference brought together policymakers and the general public. The presentation, titled "Age-Friendly Environment in Lithuania: Findings from the Survey of Health, Ageing and Retirement in Europe (SHARE)", introduced aspects of an age-friendly environment in Lithuania based on the World Health Organization (WHO) model and SHARE data, comparing them with other European countries. The presentation showcased the scope of SHARE data and its benefits for policy analysis.

SHARE data also formed the basis of a presentation by Prof. Kairys at Lithuania's largest innovation conference, LOGIN, which attracts upwards of 7,000 participants. His presentation, titled "Five Tips on How to Age", explored the aging situation in Lithuania based on SHARE data and discussed it in the context of the active aging concept.

ON THE INTERNATIONAL LEVEL

European Commission

Healthcare workforce demand and supply in the EU

Europe has been witnessing an ageing population for several decades, driving up the demand for health services. EU Member States therefore need to strategically plan their healthcare workforce, which is complex as it involves interconnected factors such as the demographic characteristics and health status of the population, the age profile of the health professionals' and decisions on public health spending. To produce reliable projections, the European Commission uses the Supply AND DEMand model for the healthcare workforce (SANDEM). SHARE is a key data source for this model. Particularly, SHARE data is key to understanding how healthcare needs are "compressed" into fewer years before death rather than expanded across the full range of old ages.

OECD

Health at a Glance 2024 Report

The 2024 edition of Health at a Glance: Europe, jointly published by the OECD and the European Commission, provides a comprehensive assessment of health systems across Europe, with a thematic focus on health workforce challenges and promoting healthy longevity. The report draws on a wide range of data sources, including SHARE, to inform evidence-based policy development. SHARE data are particularly valuable for analysing the health status, chronic disease burden, and risk factors among older adults, helping to contextualize demographic trends and inform strategies for healthy ageing across EU countries.

Policy Brief on End-of-Life Care

The OECD policy brief "Why is care at the end of life not matching people's preferences?" highlights the growing importance of accessible, person-centred end-of-life care as populations age. Drawing on multiple international data sources, including SHARE, the brief shows how people's preferences – especially the desire to die at home – often go unmet due to limited palliative care resources and insufficient support for family caregivers. SHARE data play a key role in understanding patterns of care use, informal caregiving, and long-term care needs across Europe, supporting the brief's evidence-based recommendations for improving end-of-life care policies.

OECD & European Commission

Beating cancer inequalities in the EU

Cancer is a major public health concern in Europe. In 2022, there were an estimated 2.78 million new cancer cases in the 27 European Union Member States plus Iceland and Norway, which is equivalent to about five new diagnoses every minute. By 2035, it is anticipated that cancer will be the leading cause of death in Europe. In an effort to tackle cancer across Europe, the OECD & European Commission have jointly published the report "Beating cancer inequalities in the EU" to shine a spotlight on prevention and early detection. It heavily relies on SHARE data to understand mechanisms such as the association between education levels and the reception of mammograms, cancer prevalence and migration, or the uptake of cancer screening varies according to individual socio-economic characteristics.



OPERATIONAL ASPECTS

SHARE is grateful for the financial support received. We thank the German Federal Ministry of Education and Research and the European Commission, for financing the central coordination of SHARE. We are thankful to national governments, research councils and foundations for funding the data collection in the member countries.

We thank the EU Commission and the US National Institute on Aging for their support of innovation in SHARE and the additional support of data collection in those countries that are facing financial challenges.

SHARE-ERIC COUNCIL MEETINGS 2024

The 17th SHARE-ERIC Council Meeting took place on Monday 18th of June 2024 in Berlin.

The Chair of the Council, Dr. Sandro Holzheimer, informed that the change of the Statutory Seat of SHARE-ERIC to Berlin, Germany, has been approved by the Council in written circulation procedure. During the session, the Council unanimously elected Prof. Dr. David Richter as the new Managing Director of SHARE-ERIC for a term of five years, starting January 1st, 2025.

The Acting Managing Director, Prof. Dr. Agnieszka Chłoń-Domińczak, reported on current developments and SHARE activities. Among other topics, she referred to the continuing transition to becoming a permanent infrastructure, the preparations for Wave 10 fieldwork, the revision of the SHARE-ERIC Statutes, and the preparations for the ESFRI monitoring review.

The Head of SHARE Infrastructure, Prof. Dr. David Richter, presented current developments from the SHARE Berlin Institute (SBI). He introduced new colleagues at SBI and stresses his vision for SBI to serve as a research-based infrastructure. He reported the latest achievements, like the SHARE Release 9-0-0 in spring 2024, the introduction of new data citation standards, the submission of the SoGreen proposal

(with GGP, GUIDE, ESS, CTs), the joined methodological competence platform, and the establishment of the SHARE International Seminar Series.

In line with standard practice, the Council meeting included a focus on SHARE-ERIC's financial affairs. Kathrin Axt, the Head of Finances of SHARE-ERIC, reported on the different funding sources and explained that SHARE-ERIC is an escrow holder of EU funds and national funds. Furthermore, she presented the Financial Statement for 2023, which was acknowledged by the SHARE-ERIC council. She further presented the Spending Plan for 2024 to the approval of the SHARE-ERIC council without objections.

The 18th SHARE-ERIC Council Meeting took place online on Tuesday 19th of November 2024.

The new Chairman of the Council was elected at this meeting. The delegates decided unanimously to elect Dr. Dieta Lohmann as new Chair of the SHARE-ERIC Council. In addition, the Council confirmed that the term of Prof. Dr. Axel Börsch-Supan as Managing Director of SHARE-ERIC will end on December 31, 2024. The council decided unanimously to remove Prof. Dr. Axel Börsch-Supan from the position of Managing Director of SHARE-ERIC, effective December 31, 2024.

Prof. Dr. David Richter presented to the Council, among other topics, that Wave 10 was successfully started, the Consortium Agreement was signed in all participating countries with the exception of Israel, the internal release of SHARE-HCAP, the start of preparations for Wave 11 and 12, the extension of SHARE-ERIC beyond 2024 and the approval by the European Commission to the changes of the Statutes, effective from 1st January 2025.



SHARE WAVE 10 POST-FIELD REHEARSAL MEETING

(15–17 MAY 2024 IN LARNACA, CYPRUS)

In spring 2024, the SHARE Wave 10 Post-Field Rehearsal Meeting in Larnaca, Cyprus, offered a dynamic agenda focused on survey operations, scientific research, and strategic planning. The event began with a warm welcome from the Cypriot Country Team and esteemed ministers, who emphasized the importance of SHARE and set the tone for productive discussions. The morning sessions provided updates on the role of SHARE in shaping public policy, followed by insightful scientific presentations on topics such as cross-country vaccination trends and long-term mental health challenges post-COVID-19.

After a brief lunch break, the meeting delved into the state of affairs at SHARE, highlighting achievements such as the initial results of the ESFRI Review and the introduction of new country team members. The afternoon also featured reports on current EU and NIA projects, as well as updates from the Operators Meeting on data quality checks and fieldwork strategies. The day concluded with evaluations of the Field Rehearsal for Wave 10 and discussions on new

content for upcoming waves, including innovative approaches to sampling and survey methodology.

The second day of the meeting began with a session dedicated to country team leaders' perspectives on the state of affairs. The remainder of the morning focused on exploring scientific topics for SHARE's future questionnaire. Four working groups, representing the scientific pillars of SHARE 2.0, presented their ideas, highlighting their significance for both research and policy advice. Discussions centred on the relevance of these topics in shaping the next phase of SHARE and their potential impact on evidence-based policymaking. The meeting wrapped up with discussions on EU reporting, budgeting, and the future scheduling of SHARE waves, emphasizing the need for continued collaboration and innovation.

Overall, the gathering in Larnaca underscored SHARE's commitment to advancing aging research and survey methodology, fostering a spirit of collaboration and forward-thinking among participants.



SHARE WAVE 10 MID-TERM FIELDWORK MEETING

(4–6 DECEMBER 2024 IN INNSBRUCK, AUSTRIA)

The winter SHARE Meeting in Innsbruck, Austria, brought together country team members, international coordinators, Scientific Monitoring Board representatives, and SHARE Central team members to evaluate recent survey outcomes and discuss the transition to SHARE 2.0. The first day began with welcoming remarks from the Austrian Country Team, followed by updates on project affairs and strategic initiatives.

After that the morning featured presentations on the Four Avenues for SHARE 2.0, highlighting the work of the dedicated working groups that aim to define SHARE's scientific direction for the next decade. The scientific relevance of key topics was discussed in depth, starting with "Disease Prevention and Health Maintenance," which focused on health-related quality of life and cognitive assessments. The avenue "Inequality" explored financial, digital, and health disparities, emphasizing the need for cross-country comparability. Meanwhile, the avenue "Silver Economy" examined digitalization and its implications for older adults, particularly in terms of participation in economic and social life. The working group "Flexible Old-Age Care" reported on its progress, highlighting their key achievements such as the NIMLAS proposal and participation in an Eurostat meeting.

In the afternoon, a dedicated session on the transition to SHARE 2.0 outlined developments in software infrastructure, timeline adjustments, and implications for both SHARE Central and country teams. This was followed by a session on data security and compliance, which emphasized best practices in data protection, regulatory requirements, and handling sensitive information. Additionally, discussions covered the state of SHARE-ERIC finances and EU grants. The day concluded with a Management Board meeting.

The second day featured sessions for Country Team Leaders, providing a platform for five-minute elevator pitches to showcase various projects. Updates from the Management Board and Scientific Monitoring Board addressed key developments, with the latter acknowledging the transition from Munich to Berlin and welcoming the strategic direction for SHARE 2.0's multi-mode future. The meeting concluded with a symposium honouring Axel Börsch-Supan, recognizing his many years of leadership and contributions to SHARE.

SHARE PUBLIC RELATIONS AND SCIENTIFIC DISSEMINATION

Communication is essential for SHARE's success. As a research infrastructure, we must effectively reach a diverse set of stakeholders – internal and external project partners, researchers, policymakers, funders, media, the general public, and our respondents. Keeping these groups informed and engaged is key to SHARE's continued visibility and relevance. SHARE's public relations play a central role in addressing these varied audiences through targeted (online) content and by maintaining SHARE's communication channels. To this end, a significant step was the launch of the SHARE BERLIN Institute (SBI) website in May 2024, which expanded SHARE's online presence.

A new team structure

Since April 2023, the work of the Public Relations team has been complemented by the Scientific Dissemination team, which focused on reaching current and potential researchers and sharing research findings with broader audiences. To streamline efforts and to strengthen outreach, these teams were integrated under the umbrella of a newly established **Research Data Center and Communication** team in November 2024. This new team is responsible for data documentation, user support, as well as designing and implementing communication strategies tailored to different

stakeholder groups, with the goal of further increasing SHARE's visibility across a range of platforms and publications.

Continuing key publications and resources

The SHARE Working Paper Series continues to be a key platform for SHARE-affiliated researchers to publish preliminary results and methodological and technical papers aimed at facilitating the use of SHARE data. Five new working papers and technical papers were published in 2024. In addition, a new Scales Manual was published in May 2024, an important tool for facilitating data use, summarizing the scales and multi-item indicators with updated information from Wave 9.

Promoting research through scientific events

The SHARE International Seminar Series (SISS) continued in 2024. The online webinars were launched to foster exchange among SHARE users and the wider research community. The seminars have been well received, regularly attracting 50-70 participants per session. The first series consisted of seven seminars and concluded in Summer 2024. The second series began in January 2025 and is ongoing.

In November 2024, the SHARE BERLIN Institute organized a **scientific symposium** for its shareholder institutions. This event prioritised scientific exchange on the topic of **"Inequalities in Health, Retirement and Care in an Ageing World"** and brought together researchers from SHARE and the shareholders WZB, DIW, Charité, and DZA. The aim was to foster collaboration using SHARE and complementary data sources. The full-day event featured numerous presentations and lively discussion.

This was followed by the **SHARE-Gateway** User Conference, held over three days and showcasing research not only based on SHARE data but also on data from sister studies within the global Gateway to Global Aging Data network. The international scope of this event reflected SHARE's increasingly global engagement.

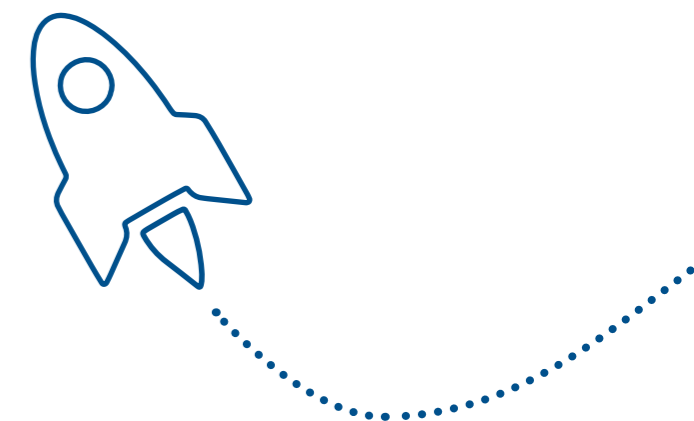
These and other events were supported by the Communication team through social media coverage before, during and after the event, as well as designing and distributing promotional materials. The Communication team also collaborated with other departments to develop a series of posters highlighting SHARE's main features and different datasets.

To support SHARE-affiliated researchers and country teams, the Communication team created a standard SHARE introduction presentation, which is regularly updated and available for use at scientific events. This material can be customised by country teams to fit local contexts and needs.

Being active on social media

Over the years, SHARE developed various social media formats tailored to ensure visibility across different domains. These have helped to engage with international researchers and policy makers and have included news of online events and publications, exchange with partner projects, job vacancies and scientific updates. Throughout the last reporting period, the Communication team ensured the visibility of the survey through its online channels. SHARE's social media community consists mainly of researchers around the world, who use SHARE data.

The Communication team engages in online networking with researchers, for example by reposting their SHARE-based research or informing about scientific events. These activities benefit SHARE by extending its reach to an even wider global network. Overseeing and managing all social media activities, the Communication team also engages with the SHARE country teams.



PROJECTS AND COOPERATIONS

Overview of SHARE's Current International Projects and Cooperations

CURRENT SHARE PROJECTS

SHARE-COVID19

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

The overarching objective of the SHARE-COVID19 project was to understand the non-intended consequences of the epidemic control decisions to contain the COVID-19 pandemic and to devise improved health, economic and social policies. The project pursued a transdisciplinary and internationally comparative approach by exploiting the data sources of the SHARE research infrastructure. It covers all EU Member States.

SHARE HCAP

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

The project administered in-depth measurement of cognition according to the Harmonized Cognitive Assessment Protocol (HCAP), which had been developed for the HRS-style aging surveys supported by NIA. Using these data, the project estimated prevalence rates of mild and severe cognitive impairment in the SHARE countries; compared these with HRS and other participants in the HCAP studies; and exploited the international variation of the SHARE plus SHARE-HCAP data to identify which interactions of biomedical and socioeconomic conditions over the life course affect cognition later in life.

SHARE HCAP
Think-Recognise-Remember: the Health Study

SHARE COHESION

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

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

EUCOVII

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

EUCOVII was the follow-up project of EUCOV in 11 SHARE member countries. The overall aim was to maintain full EU coverage in SHARE Wave 10 to provide the largest possible SHARE database to

the research community, the European Commission, and supranational organisations. This included all final preparations and the start of the main data collection of Wave 10, data cleaning, and the data release of SHARE Wave 9. The overall aim was achieved by extending the support of DG Employment, Social Affairs and Inclusion in the eight EU member states that joined SHARE in Wave 7 (BG, CY, FI, LT, LV, MT, RO, SK) with the exception of Latvia, which was able to secure national funding for Wave 10, and in four "crisis countries" (EE, ES, GR, PT). This project is succeeded by EUCOV III, which covers Wave 10 and the preparations of Wave 11 (project start on 4 March 2025).

CURRENT PROJECT COOPERATIONS



ERIC Forum 2

The ERICs, under the umbrella of the ERIC Forum, represent one of the leading science policy voices in Europe and play a key role in structuring the research infrastructure landscape. Following the successful implementation of the ERIC Forum (2019-2022), the follow-up project started in 2023: ERIC Forum 2. SHARE-ERIC is involved in the ERIC Forum 2 activities through its affiliated entities: SHARE BERLIN Institute and the SGH Warsaw School of Economics.

The project aims to structure the cooperation between ERICs, support the implementation of the ERIC Regulation and ERICs services, and consolidate

the integration of the ERICs in the European Research Area by deepening the ERIC Forum's contribution to research policies. To reach its objectives, the project relies on a multi-disciplinary consortium involving all identified ERICs. Despite different fields and modes of operations, many challenges that ERICs face are similar, and the common voice, especially in dialogue with the European Commission and other stakeholders gains more visibility.

The activities carried out within the project ensure the implementation of specific results on three key target groups: (1) the ERICs and ERICs-to-be, in order to increase their knowledge and propose solutions for key aspects of the ERIC Regulation implementation; (2) the policy-makers and stakeholders by setting-up and managing the new ERIC Forum monitoring and reporting platform, thus ensuring an easy access to updated and consolidated data and information about the ERICs, as well a further strengthened role in the European science policy; and finally (3) the users, as the project investigates the sustainability and open access of its services and addresses the challenges related to the commercial aspects of service provision. The project particularly contributes to the topics related to the ERIC alignment on EU policy priorities and visibility in the national arena, capacity-building programme for ERICs personnel upskilling, including shared solutions to privacy and data protection challenges, gender equality plans, their development and implementation, and recommendations related to the employment contracts and practices.

In 2024, SHARE-ERIC participated in the annual ERIC Forum 2 meeting, where updates on the project's progress, current results, and future plans were presented. In the first stage of the project, SHARE contributed to the work related to employment contracts and employment practices, sharing our experience, as well as gender equality aspects.

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

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

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

UPCOMING PROJECTS

SOGREEN

(The project start is on 1 January 2025)

The goal of the SoGreen project is to enhance the capacities of the four leading social science infrastructures in Europe ESS ERIC, SHARE ERIC, GGP and GUIDE, and generate valuable insights aimed at facilitating the study and evaluation of the social aspects of the green transition for different generations and socioeconomic groups across Europe, using a life-course perspective. SoGreen will contribute to the work programme topic "Next generation of scientific instrumentation, tools and methods and advanced digital solutions" by developing new services, comprising innovative tools, solutions, and questionnaire modules related to the social aspects of the green transition. The unique longitudinal and multi-generational perspective of the infrastructures involved goes beyond the state of the art by integrating new data and novel analytical frameworks to foster interdisciplinary insights on the green transition at national and regional levels, including new services, including geospatial data linkable with survey datasets and new visualisation tools. Central to our approach is the collaborative development of a new tool, the Green Transition Questionnaire Module, to ensure coherence in addressing environmental themes which will then be fielded within the different surveys. Moreover, we will also prepare harmonised aggregates of collected data and their visualization through a joint dissemination platform, enhancing accessibility and

promoting consistency in data interpretation across various studies. The Knowledge Mobilisation Lab will be another new and innovative tool to identify, build, and engage a multifaceted network of different audiences and stakeholders. This includes professionals from policy, research, non-profit, and private sectors, thus actively shaping the discourse and informing developments related to the green transition.

FINAN CIAL ASPE CTS

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

FINANCIAL ASPECTS

SHARE is a versatile research infrastructure that serves a wide range of user groups. It extends beyond a simple social survey by incorporating advanced (and therefore costly) health measurements. Moreover, SHARE reflects the European Commission's commitment to including all EU member states, despite significant differences in their capacity to fund SHARE.

The financing arrangements for SHARE-ERIC, as detailed in Article 11 of the SHARE-ERIC Statutes (effective January 1, 2025), establish that each Contracting Party (country) is responsible for funding its share of survey costs, either directly or through its designated Scientific Partner Institution. Additionally, countries are required to cover their share of operating costs, including personnel and related expenses, through these institutions. The Federal Republic of Germany shall finance the central coordination costs of the Survey that occur in Germany ("SHARE Central"). Beyond these obligations, all Contracting Parties must contribute to common

costs (Membership Fee), which cover budgets for the Management Board and the Scientific Monitoring Board, as specified in the Annual Spending Plan.

Country contributions

Country contributions (membership and participation fee) for 2024 were approved by the General Assembly at its 16th meeting on 5 June 5, 2023. The membership fee is 5,000 Euros. The participation fee is between €25,000 and €50,000, depending on the country's classification.

These fees are used to pay the SHARE-ERIC administration, the routine IT services of Centerdata, and data protection obligations of the SHARE-ERIC.

The country contributions for 2024 are presented in Table 1. These are payments received in 2024, consisting of direct payments, third-party funding or payments for previous years. The contributions for 2024 will be fully paid once the payment from the Netherlands is received.

Table 1: Country contributions to central costs of SHARE-ERIC, 1 January – 31 December 2024

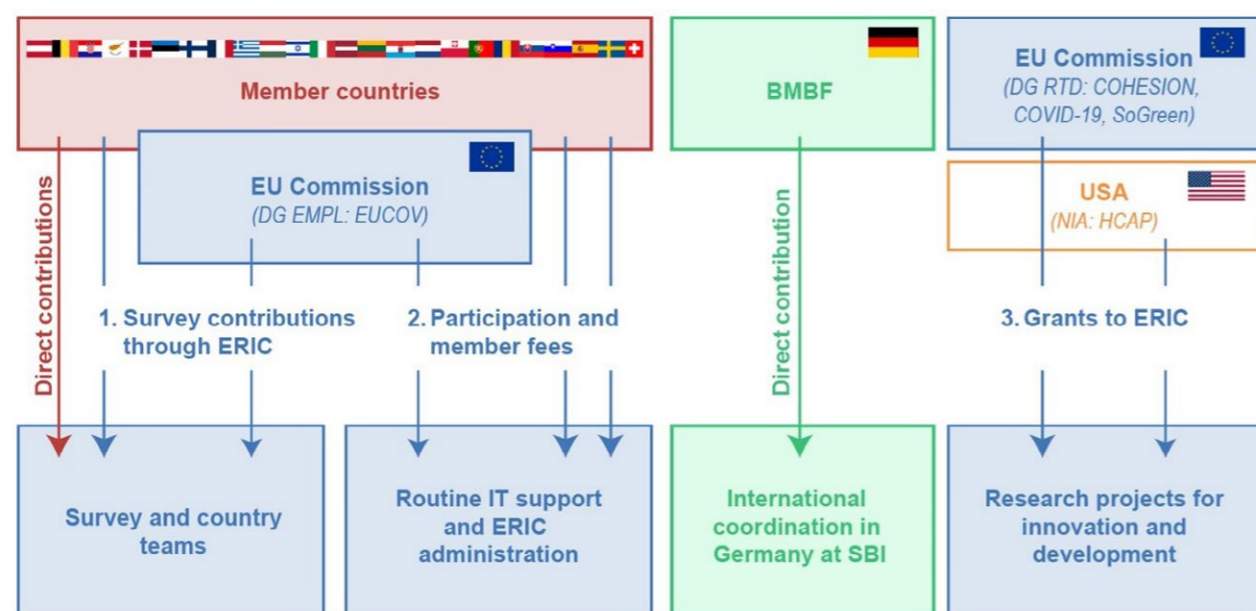
| Country | Status | Contributions (€) |
|----------------|-------------|---------------------|
| Austria | Member | 42,500.00 |
| Belgium | Member | 55,000.00 |
| Bulgaria | Member | 30,000.00 |
| Croatia | Member | 30,000.00 |
| Cyprus | Member | 35,050.00 |
| Czech Republic | Member | 30,000.00 |
| Denmark | Participant | 37,500.00 |
| Estonia | Participant | 10,050.00 |
| Finland | Participant | 81,000.00 |
| France | Member | 55,000.00 |
| Germany | Member | 98,000.00 |
| Greece | Member | 35,050.00 |
| Hungary | Member | 30,000.00 |
| Israel | Member | 42,500.00 |
| Italy | Member | 55,000.00 |
| Latvia | Participant | 25,000.00 |
| Lithuania | Participant | 65,050.00 |
| Luxembourg | Participant | 37,500.00 |
| Malta | Participant | 35,050.00 |
| Netherlands | Member | |
| Poland | Member | 30,000.00 |
| Portugal | Participant | 35,050.00 |
| Romania | Participant | 35,050.00 |
| Slovakia | Participant | 10,050.00 |
| Slovenia | Member | 54,000.00 |
| Spain | Participant | 50,000.00 |
| Sweden | Member | 55,000.00 |
| Switzerland | Participant | 50,000.00 |
| | | 1,148,400.00 |

Funding

The financial aspects described in this section reflect this diversity. Some countries have several funders; other countries are subsidized by European Commission funds. Altogether, SHARE has over 50 different sources of funding. Some funds go directly from a member country to the country team or a survey agency without showing up in the books of SHARE-ERIC. Other funds are administered by the ERIC for harmonization, governance and tax reasons, but are used to finance expenditures in the SHARE member countries. Yet other funds are used to finance the administrative tasks of SHARE-ERIC. Figure X1 gives a schematic overview of the monetary flows in SHARE.



Figure X1: Monetary flows of funds in SHARE



Third-Party-Grants

In 2024, three EU projects in which SHARE was involved as coordinator or partner will end successfully. The EU HORIZON 2020 Project "SHARE-COHESION", GA 870628, coordinated by SHARE-ERIC supported innovation and development of the normal SHARE waves. The data base construction at SBI GmbH and the scientific analysis at other SHARE "Linked Third Parties" of the data collection of the second COVID-CATI telephone interviews during the pandemic has been funded by DG RTD and coordinated by Max Planck Society and with a no-cost extension until 30 June 2024, with the "SHARE-COVID-19" grant.

The US National Institute for Aging supported the measurement of cognitive decline and dementia with the "HCAP" grant awarded also to Max Planck Society, the data collection itself being fund-

ed by a subaward to SHARE-ERIC and data base construction by a subaward to SBI GmbH. A further EU project grant from HORIZON Europe called 'SoGreen', which was submitted together with the ESS ERIC and other 'ERICs in planning' - GGP and GUIDE - was applied for in March 2024 and approved at the end of 2024, so that the project could start on 1 January 2025 as planned.

Since 2023, the central international coordination of SHARE takes place at the newly founded SHARE Berlin Institute GmbH (SBI) in Germany and is funded by the German Ministry of Research and Education (BMBF). Costs are about 2 million Euro annually, covering the routine expenditure of the central coordination of SHARE. These costs are transferred directly from the BMBF to the SBI without any involvement of the ERIC.

Table 2: Third-Party-Contribution 1 January – 31 December 2024

| Country | Status | Contributions (€) |
|----------------------------|--|-------------------|
| DG EMPL | EUCOV | 261,067 |
| EU Horizon 2020 | COHESION SHARE COVID 19 | 58,219 160,742 |
| EU Horizon Europe | SoGreen | 3,749,306 |
| DFG | DFG Grant MEA | 683,425 |
| NIA | HCAP | 1,656,675 |
| Direct contribution | | |
| BMBF Germany | International coordination in Germany at SBI | 1,803,671 |

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

Since DG Research has ended supporting routine expenditures of research infrastructures, the member countries pay such expenditures through the participation fee (until 2024; from 2025 through the membership fee). In some countries, DG Employment paid a share of this fee. It amounted to

about 593,400 euro in 2024 and covered the costs of software programming and IT support of the SHARE survey in the Netherlands. In addition, the membership fee covers the financial and legal administration of the legal entity SHARE-ERIC which amounted to about 341,047 Euro in 2024.

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

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

Table 3: Statement of comprehensive income

| | 2024 | 2023 |
|---|------------|-----------|
| | Euro | Euro |
| Income | 11,616,125 | 6,663,538 |
| Direct costs | 5,250,428 | 5,220,400 |
| Gross Surplus | 6,365,697 | 1,443,138 |
| IT support | 593,400 | 542,315 |
| Administrative expenses | 341,047 | 273,790 |
| Restricted reserves | 4,898,340 | 156,815 |
| Unrestricted reserves | 532,910 | 470,218 |
| (Deficit)/Surplus For The Financial Year | 0 | 0 |

Table 4: Statement of financial position

| | 2024 | 2023 |
|------------------------------------|-----------|-----------|
| | Euro | Euro |
| Current Assets | | |
| Cash at bank | 9,113,266 | 3,682,017 |
| amount falling due within one year | 8,580,356 | 3,211,799 |
| Net Current Assets | 532,910 | 470,218 |

Audit Statement

GKK PARTNERS Audit GmbH has been appointed to perform agreed-upon audit procedures of SHARE-ERIC for the period from 01 January – 31 December 2024.

The audit was carried out from January to May 2025 and the results were reported to the SHARE-ERIC Council on 13 June 2025. The SHARE-ERIC Council acknowledged the audit report and approved the financial statement 2024 at this meeting.

Opinion:

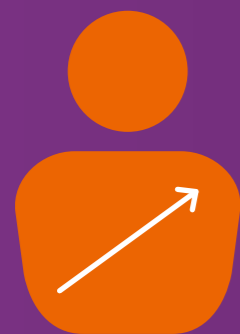
The Independent Auditor’s Report to the Council of the Survey of Health, Ageing and Retirement in Europe (SHARE) a European Research Infrastructure Consortium (ERIC) states that we, GKK PARTNERS Audit GmbH, after performing the agreed-upon audit procedures regarding to the accounting records of the SHARE European Research Infrastructure Consortium (the “ERIC”) for the year ended 31 December 2024, have noted no findings.



SHARE IN NUMBERS

FACTS & NUMBERS

Number of Registered Users



18,470
in year 2023

20,652
in year 2024

2023: **450**

2024: **450**

Processed  User Requests

User Workshops

2023: **29**

2024: **21**



User Countries

2023: **89**

2024: **91**



Publications

2023: **3,971**

2024: **4,143**

SSCI-ranked Publications

2023: **1,456**

2024: **1,564**



100%

100% of our own Publications are published as Open Access

Participating Countries

Full coverage of 28 countries since 2017 (W7)

Interviews



616,000
Wave 1 to 9

Policy Actors Using SHARE Data



2023: **645**

2024: **691**



Respondents
160,000

Global Sister Surveys:

18



Social Media Followers



LinkedIn

2023: 250
2024: 850



Bluesky

Available from 2025 onwards



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

SCIENTIFIC PARTNERS OF SHARE-ERIC MEMBERS



AUSTRIA

University of Linz, Dept. of Economics

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

BELGIUM – NL

University of Antwerp, CSB

CSB's principal objective has been to study the adequacy of social policies. Its research is mainly based on large-scale socio-economic surveys of households. Koen Decancq leads the Belgian country team.

BELGIUM – FR

University of Liège, CREPP

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

BULGARIA

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

man and society, in accordance with the academic, national, and European criteria and world trends in science, and trains highly qualified specialists in the academic disciplines of philosophy, sociology, science studies, and their sub-divisions. Country team leader for Bulgaria is Assoc. Prof. Ekaterina Markova.

CROATIA

University of Zagreb, Faculty of Economics and Business (FEB)

FEB is the most important institution of higher education and research in economics in Croatia. The Centre for Longitudinal Population Studies (CLPS) at the FEB coordinates the Croatian participation in the SHARE study. The Centre's research activity is focused on international multidisciplinary population surveys, with dominant reliance on longitudinal survey data. Šime Smolić leads the Croatian country team.

CYPRUS

University of Cyprus, Economics Research Centre

The Economics Research Centre of the University of Cyprus (CypERC) is an independent non-profit research institution aiming at high-quality policy-oriented research in economics with emphasis on subjects concerning the Cyprian economy. The CypERC is financed by research organisations in Cyprus and the European Union, through competitive funding procedures, and contributions from governmental and other organisations. The research activities of the CypERC are divided into the sectors of Microeconomic Analysis and Welfare, Macroeconomic

Forecasts and Analysis, Employment, and other research projects. Nikolaos Theodoropoulos, Associate Professor at the Department of Economics and member of the academic council of CypERC, is the leader of the Cyprian country team.

CZECH REPUBLIC

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

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

FRANCE

LEDa-LEGOS, Paris-Dauphine University

The Department of Health Economics and Management (LEDa-LEGOS) at Paris-Dauphine University is one of the leading departments for Health Economics in France. LEGOS's main fields of specialisation are economics of ageing, health inequalities, social security and health systems efficiency. Florence Jusot, Professor of Economics, leads the French country team.

GERMANY

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

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

conducting substantive and methodological research at the interface between socio-economic and bio-medical research. David Richter, Professor of Psychology, is the Director SHARE Infrastructure at SBI. The German country team is part of the Munich Research Institute for the Economics of Aging and SHARE Analyses (MEA-SHARE). MEA's research areas are savings, social insurance and public policy; macroeconomic implications of population ageing; and public health. Until the end of 2024, MEA-SHARE hosts SHARE-ERIC and SHARE Germany. MEA-SHARE is represented by Axel Börsch-Supan, Professor of Economics. Arne Bethmann leads the German Country Team.

GREECE

Panteion University, Athens

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

HUNGARY

Centre for Economic and Regional Studies

The basic activity of the Centre for Economic and Regional Studies, consisting of the Institute of Economics, the Regional Research Institute and the Institute of World Economics, is the scientific analysis of the Hungarian economy, the international economic and political environment, and of economics

in general. The Centre undertakes theoretical and empirical studies in the fields of national and world economics, in regional processes and in other interdisciplinary areas of the Social Sciences. Anikó Bíró leads the Hungarian country team.

ISRAEL

The Hebrew University of Jerusalem, IGDC

The Israel Gerontological Data Center (IGDC) at the Hebrew University in Jerusalem facilitates research and dissemination of data on ageing, and directs the Israeli participation in the SHARE project. Sharon Shiovitz-Ezra leads the Israeli country team.

ITALY

University of Padua, Dept. of Economics

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

THE NETHERLANDS

Utrecht University School of Economics

The Utrecht University School of Economics focuses on social themes concerning the future of work, behavioural insights for policy making, entrepreneurship, sustainable finance, and sustainability and economic development. Bella Struminskaya leads the Dutch country team.

POLAND

Warsaw School of Economics

Warsaw School of Economics is the oldest university of economics in Poland and one of Europe's leading universities in this field. Agnieszka Chłoń-Domińczak is the Polish country team leader.

SLOVENIA

Institute for Economic Research 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. Apart from the research CEDAR also produces a number of large longitudinal datasets including both contemporary and historical demographic, socio-economic and health information. Gunnar Malmberg is professor at CEDAR and leader for the Swedish country team.

SCIENTIFIC PARTNERS OF SHARE

DENMARK

University of Southern Denmark, Department of Economics, Odense

ESTONIA

Tallinn University, Estonian Institute for Population Studies, Tallinn

FINLAND

Väestöliitto, Helsinki

University of Eastern Finland, Joensuu and Kuopio

LATVIA

Rīga Stradiņš University, Institute of Public Health, Riga

LITHUANIA

Vilnius University, Faculty of Philosophy, Vilnius

LUXEMBOURG

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

MALTA

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