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SHARE is a research infrastructure which studies the effects of health, social and economic policies in Europe over the life-course of European citizens. SHARE was created after a joint communication by the European Council and the European Parliament to the European Commission. It has been a huge success measured by the number of users, the number of scientific publications and its public policy support. The data has world-class value as proven by the many users also outside of the EU, especially in the US. The key value of SHARE lies in its strict cross-national comparability which permits unbiased cross-national comparisons of the economic, health and social situation of European citizens aged 50 and over.

To obtain this key value, SHARE aims to include all European countries, especially all EU member states. SHARE has made great progress during the first waves and has collected data in 28 countries. Moreover, substantial international coordination has to be done among these countries. To this end, SHARE has implemented an efficient and effective central management model.

The project aims to strengthen the centralised approach of SHARE with the aim to combine scientific excellence with cohesion across all 28 SHARE member countries. Specifically, the project will support the supra-national innovation and development tasks to be executed by the Area Coordinators (scientific content) and the survey designers (fieldwork methods and electronic tools) during Waves 8-10 of SHARE.

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Available at: <https://share-eric.eu/projects-overview/share-cohesion-public-project-deliverables>

## **WP1: Overall project coordination**

### **Objectives:**

- To manage the contractual tasks of the entire consortium
- To foster internal communication via conferences, working meetings and electronic means
- To coordinate the reports and deliverables that each activity generates
- To ascertain quality control by standards and procedures documented in a SHARE Manual

### **Tasks:**

The main task of WP1 is to lead and manage the entire project. The outbreak of the COVID-19 pandemic in spring 2020 led to the interruption of Wave 8 fieldwork in all countries participating in SHARE and the switch from face-to-face interviews to telephone interviews. These were conducted in July and August 2020. From autumn 2020 until the end of the reporting period (October 2021), SHARE Central calculated the final response and retention rates of Wave 8, and managed the new contracts and procurement for Wave 9. Overall, three virtual conferences took place. In addition to this, SHARE Central was also instrumental in the development and training activities for Wave 9.

### **Deliverables:**

Work on the following deliverables was executed during the reporting period:

Number	Title	Due date	Status
D1.1	Internal website	31 Oct 2019	Delivered
D1.2	SHARE Manual with KPIs and GDPR	31 Oct 2020	Delivered
D1.3	Midterm report	31 Oct 2021	Delivered
D1.4	Final project report	30 Sep 2023	Pending

### **Summary of progress:**

During this first reporting period, WP1 worked on the maintenance and improvement of the SHARE Internal Website. This intranet can be entered via a login form on the central SHARE website [www.share-eric.eu](http://www.share-eric.eu). The intranet holds a wide array of functions, which support the operation of SHARE across countries and consortium members (e.g., accessing information on upcoming SHARE meetings and looking up the latest version of the survey schedule). Additionally, the download section of the intranet offers PR materials such as logos, templates for print products and presentations, graphs on the latest number of SHARE users and publications. Users of the intranet can download manuals such as a practical introduction and reference book for SHARE country teams, a list of contact persons, or data protection guidelines as well as presentations and minutes of past conferences. One additional feature is the Database Management Forum, which is meant to facilitate and document the exchange of knowledge and cooperation within the database management group. The SHARE Internal Website was submitted as Deliverable D1.1.

Furthermore, WP1 worked on an update of MASHA – Manual for SHARE. MASHA serves two main purposes: a) It serves as an introduction to the Survey of Health, Ageing, and Retirement in Europe (SHARE) from an operational perspective. It is targeted to all persons starting working for SHARE, especially new people at the university-based teams in the countries implementing SHARE. Therefore, the manual takes the perspective of the Country Team and puts special emphasis on the Country Team's role within the entire SHARE project. b) It serves as a reference book. The overall structure of the document moves from the big picture of the overall structure, to an overview of the roles in the Country Teams, onwards to the description of tasks relevant to the Country Teams, and lastly to short explanations of (SHARE-)specific terminology in the glossary. The revised version of MASHA with additional explanations was uploaded to the Participant Portal as Deliverable D1.2.

The reporting period includes the fieldwork period of Wave 8. By the end of March 2020 and after the suspension of fieldwork, two thirds (around 60,000 participants) of all study participants had been interviewed. The survey was resumed based on a telephone-based additional survey (CATI) about the impact of the COVID-19 crisis on the health, economic situation, social networks, and living conditions of the respondents (SHARE Corona Survey). The telephone interviews were carried out from June to August 2020 with those surveyed in Wave 8 as well as those not yet surveyed. In autumn 2020, the first release of the data was prepared and the evaluation of compliance with our standards was summarized in a report (Compliance Profiles Wave 8). The fieldwork of Wave 8 yielded about 57,000 interviews and the SHARE Corona Survey about 58,000.

During this reporting period, SHARE Central has been active in the calculation of the final response and retention rates of Wave 8, setting up and managing the new contracts, the procurement for Wave 9, preparations for the Wave 9 questionnaire, the organization of three virtual conferences, and grant reporting activities. A sizable proportion of SHARE Central's efforts was expended on the conceptualization of the scientific and technical framework of Wave 9 and coordination of the development of the scientific tools for conducting the Wave 9 fieldwork. The key achievement in this development phase was the introduction of functionality in the interview tools that enabled the agency to switch from the telephone mode to the personal mode and vice versa. This enables the interviewers to use the correct mode (be it telephone or in person), with the appropriate interface and the right buttons displayed so that interviews can be conducted in the right mode for a specific round of fieldwork. SHARE Central also ensured harmonization of this switch from one mode to the other across the various SHARE countries. In order to ensure GDPR compliance in the event of data deletion requests, the electronic tools were adapted at different levels. At the very end of this reporting period, the train the trainer sessions (TTT) for Wave 9 CAPI were conducted in early October. At the time of completion of this report, some countries already have conducted their national training sessions and started with fieldwork for Wave 9.

## WP2: Health

### Objectives and tasks:

- To upgrade and coordinate comparable health measurement across the entire project
- To implement bio-chemical analyses for biomarkers related to common chronic diseases and conditions
- Wave 8 and Wave 9: Accelerometry + HCAP

### Deliverables:

Number	Title	Status
D2.1	Upgraded health module for main survey of Wave 8	Delivered
D2.2	Upgraded health module for main survey of Wave 9	Delivered
D2.3	Upgraded health module for main survey of Wave 10	Pending

### Summary of progress:

- Upgrade of the health module for the main survey of Wave 8 with accelerometry
- Analyses of the Wave 8 health variables
- Validation study on DBS data
- Development of the Wave 9 health questionnaire
- Implementation of HCAP (cognition assessment in subsample of panel respondents) in a subsample of SHARE panel respondents in Wave 9

### Publications

- Jensen, K.H., Mose, J., Scheel-Hincke, L.L., & Andersen-Ranberg, K (2022). Is self-reported health from middle-aged and elderly credible? A validation study comparing Danish SHARE-data with national health register data. *Submitted to Annals of Epidemiology*.

### WP3: Health care

#### Objectives and tasks:

- Upgrade and redesign of the Health care (HC) module for Waves 8 to 10
- Focus on HC utilisation and access to HC

#### Deliverables:

Number	Title	Status
D3.1	Upgraded health care module for main survey of Wave 8	Delivered
D3.2	Upgraded health care module for main survey of Wave 9	Delivered
D3.3	Upgraded health care module for main survey of Wave 10	Pending

#### Summary of progress:

- Development of the Wave 9 health care questionnaire
- Analyses on social inequalities by comparing HC indicators in Wave 8 with Wave 9
- Publications on HC utilisation, informal care, unmet HC, equity in HC etc.
- Plan to work on new topics of interest such as persistent COVID symptoms, teleworking, telemedicine, long-term care

#### Work in Progress / Publications:

- Arnault, L., Jusot, F., and Renaud, T. (2021). Modernising measures of health care utilisation and access to care, in Bergmann, and A. Börsch-Supan (Eds.). SHARE WAVE 8 METHODOLOGY: Collecting Cross-National Survey Data in Times of COVID-19. Munich: Munich Center for the Economics of Aging (MEA).
- Caillive, G., Arnault, L. and Bergeot, J. (in progress). Effect of informal care provision on the preventive care use of caregivers.
- Arnault, L., Jusot F., and Renaud, T. (in progress). Economic vulnerability and unmet healthcare needs among the population aged 50 + years during the COVID-19 pandemic in Europe. Eur J Ageing. <https://doi.org/10.1007/s10433-021-00645-3>
- Arnault, L., Jusot F. (in progress). Comparison of pre-pandemic measures of equity in healthcare in Europe using SHARE Wave 8.
- Mohammad, A., Arnault, L., Videau, Y. (in progress). The effect of retirement on the choice of complementary health insurance in France: results of the SHARE survey.

## **WP4: Family and social networks**

### **Objectives and tasks:**

- Upgrade Social Networks (SN) module for Wave 8 and Wave 10
- Wave 9 module on ageism, subjective aging, age awareness
- Create social integration index

### **Deliverables:**

<b>Number</b>	<b>Title</b>	<b>Status</b>
D4.1	Upgraded social network module for main survey of Wave 8	Delivered
D4.2	Upgraded social network module for main survey of Wave 9	Delivered
D4.3	Upgraded social network module for main survey of Wave 10	Pending

### **Summary of progress:**

- Social integration index: study on relationship of personality traits with SN indicators (size, frequency, quality)
- Study on how well-being is related to personality and SN
- See references below

### **Publications:**

- Litwin, H., and Levinsky, M. (2022). Does personality shape the personal social networks of older Europeans? *European Journal of Ageing*, First published online: January 6, 2022, doi: 10.1007/s10433-021-00678-8.
- Litwin, H., and Levinsky, M. (2022). The interplay of personality and social network in the subjective well-being of older adults. *Research on Aging*. First published online: August 7, 2022, doi: 10.1177/01640275221113048.

## WP5: Work and retirement

### Objectives and tasks:

- Add new measures to assess transition from work to retirement and other measures
- Check and validate self-reported employment status and earnings

### Deliverables:

Number	Title	Status
D5.1	Upgraded work and retirement module for main survey of Wave 8	Delivered
D5.2	Upgraded work and retirement module for main survey of Wave 9	Delivered
D5.3	Upgraded work and retirement module for main survey of Wave 10	Pending

### Summary of progress:

- Improvement of “jobcoder” (list of occupational titles across countries), current checks with W9 data
- Using SCS data to explore working patterns during COVID
- Starting analyses on self-perceived hazards on the job
- Linking accelerometer data with job activities
- Including IT questions in W9, proposal for new IT questions in W10
- Elaborating new set of questions on flexible working arrangements for W10

### Publications:

- Brugiavini A., R.E. Buia, I. Simonetti, 2021, “Occupation and working Outcomes during the Coronavirus Pandemic”, University “Ca’ Foscari” of Venice, Department of Economics, Working Papers Series, No 09/2021
- Bassoli E., A. Brugiavini, I. Ferrari, 2021 “Care Provision at the Time of the Covid-19: Who Suffers Most?”, University “Ca’ Foscari” of Venice, Department of Economics, Working Papers Series, No 10/2021
- Bassoli E, Agar Brugiavini, Giacomo Pasini, 2021, “*Disease Prevalence Across Europe: New Evidence from SHARE*”, The Sustainability of Health Care Systems in Europe, Emerald Publishing Limited, vol. 295, pp. 23-42 (Book Chapter)



## WP6: Income and wealth

### Objectives and tasks:

- Upgrade and restructure modules on household income and assets
- Impute missing data and generate weights

### Deliverables:

Number	Title	Status
D6.1	Upgraded income and asset module for main survey of Wave 8	Delivered
D6.2	Upgraded income and asset module for main survey of Wave 9	Delivered
D6.3	Upgraded income and asset module for main survey of Wave 10	Pending

### Summary of progress:

- Improving items on income and wealth
- Exploring how data on saving regrets relate to resorting to savings during financial shocks
- Proposing add-on module on financial decision-making that can be combined with cognition data
- Imputation of missing values for income and asset items

### Publications:

- Bertoni M., Celidoni M., Dal Bianco C. and G. Weber, 2021, How did European retirees respond to the COVID-19 pandemic?, 2021, *Economics Letters*, vol. 203, June (<https://doi.org/10.1016/j.econlet.2021.109853>)
- Bonfatti A, Pesaresi G., Weber G. and N. Zambon, 2022, The economic impact of the first wave of the pandemic on 50+ Europeans, *Empirical Economics*, R&R
- Angelini V., Celidoni M. and J. Costa-Font, 2022, Health Shocks and Wealth. Evidence from SHARE, mimeo

## WP7: Content coordination

### Objectives and tasks:

- Coordination of the questionnaire update
- Quality control during questionnaire development
- Supervise translation process

### Deliverables:

Number	Title	Status
D7.1	Upgraded questionnaire for main survey of Wave 8	Delivered
D7.2	Upgraded questionnaire for main survey of Wave 9	Delivered
D7.3	Upgraded questionnaire for main survey of Wave 10	Pending

### Summary of progress:

- Upgrade of the questionnaire for main survey of Wave 9
- Adaption of the Wave 9 End-of-Life interviews to account for the impact of the pandemic
- Implementation of a new functionality of the translation platform (Translation CTRL) that allows the translation procedure manager to get an overview of all changes made by the translators in a given week
- Beginning of the SHARE Wave 10 questionnaire development; two additional modules: a) IT questions and b) willingness to participate in an online survey (draft version was programmed and tested)

### Publications:

- *Chapter 3: Questionnaire innovations* (Melanie Wagner and Howard Howie) in Bergmann, M. and A. Börsch-Supan (Eds.) (2021). SHARE Wave 8 Methodology: Collecting Cross-National Survey Data in Times of COVID-19. Munich: MEA, Max Planck Institute for Social Law and Social Policy.
- *Chapter 3.2: Questionnaire innovations* (Yuri Pettinicchi and Elena Sommet) in Bergmann, M. and A. Börsch-Supan (Eds.) (*Forthcoming*). SHARE Wave 9 Methodology. Munich: MEA, Max Planck Institute for Social Law and Social Policy.

## **WP8: EU coverage and global harmonisation**

### **Objectives and tasks:**

- Enlarging ERIC membership
- Implementation of regional partner facilities / nodes of distributed RI
- Alignment of structural funds
- Extension of cooperation with global ageing surveys
- SHARE Cohesion Plan

### **Deliverables:**

<b>Number</b>	<b>Title</b>	<b>Status</b>
D8.1	SHARE Cohesion Plan	Delivered
D8.2	Midterm report on EU cohesion and global harmonisation	Delivered
D8.3	Final report on EU cohesion and global harmonisation	Pending

### **Summary of progress:**

- SHARE started the process of updating its statutes with a view to extending the SHARE-ERIC after 2024
- Initiatives for improving the financing possibilities via the structural funds
- Progress in establishing SHARE as a player in the intersection of bio-medical and socio-economic research in several workshops in the wake of the COVID-19 crisis
- Participation in two harmonisation meetings of global ageing studies

## WP9: Survey methodology

### Objectives and tasks:

- Retention stimulation program
- Targeting the oldest old and nursing home population
- Enhance fieldwork monitoring
- Improving sample frames
- Programming and training of the new methods

### Deliverables:

Number	Title	Status
D9.1	Upgraded survey methodological specifications for main survey of Wave 8	Delivered
D9.2	Upgraded survey methodological specifications for main survey of Wave 9	Delivered
D9.3	Upgraded survey methodological specifications for main survey of Wave 10	Pending

### Summary of progress:

- Country specific record linkage projects in Denmark, Germany and the Netherlands to expand the survey data and its research potential
- SHARE Interviewer Survey conducted during Wave 9 as another innovative source to evaluate interviewers' strategies in convincing respondents to participate
- Identification of underlying causes of attrition regarding the oldest old; (2) Identification of potential intervention areas; and (3) Implementation of field adaptations
- Random back-checks to select interviews every fortnight after each Wave 9 data delivery (in total: 7,000 households) + focused back-checks every 4-6 weeks in order to detect interviews suspected of falsification (300 interviews)

### Publications:

- Bergmann, Michael, & Schuller, Karin (2019). Improving the efficiency of data quality back checks: A new procedure to prevent curbstoning. In: Bergmann, M., Scherpenzeel, A., & Börsch-Supan, A. (2019). SHARE Wave 7 Methodology: Panel innovations and life histories. Munich: MEA, Max Planck Institute for Social Law and Social Policy.
- Bergmann, Michael; Schmid, Susanne; Butt, Sarah; Ghirelli Niccolò; Maineri, Angelica; Borghesan, Giovanni; Emery, Tom (2019a). Overview of the use of sampling frames in European studies, Deliverable 2.1 of the SERISS project funded under the European Union's Horizon 2020 research and innovation programme GA No: 654221. Available at: [www.seriss.eu/resources/deliverables](http://www.seriss.eu/resources/deliverables)
- Bergmann, Michael; Scherpenzeel, Annette; Butt, Sarah; Lynn, Peter; Emery, Tom (2019b). Report on feasibility of using a joint sampling frame in selected countries, Deliverable 2.4 of

the SERISS project funded under the European Union's Horizon 2020 research and innovation programme GA No: 654221. Available at: [www.seriss.eu/resources/deliverables](http://www.seriss.eu/resources/deliverables).

- Bergmann, Michael; Schuller, Karin; Malter, Frederic (2019c). „Preventing interview falsifications during fieldwork in the Survey of Health, Ageing and Retirement in Europe (SHARE)”. In: *Longitudinal and Life Course Studies*, 10(4), pp. 513-530. DOI: 10.1332/175795919X15694136530293.
- Bergmann, Michael, Bristle, Johanna (2020). Keeping the oldest old – A framework for survey adaptations to improve panel retention in the Survey of Health, Ageing and Retirement in Europe (SHARE). Working paper for the 30th International Workshop on Household Survey Nonresponse.
- Bergmann, Michael, Quezada Villanueva, Maria Magdalena, Hannemann, Tessa (forthcoming). The Fourth Round of the SHARE Interviewer Survey. In: Michael Bergmann & Axel Börsch-Supan (Eds.), *SHARE Wave 9 Methodology*. Munich: MEA, Max Planck Institute for Social Law and Social Policy.
- Hannemann, Tessa, Bergmann, Michael (2021a). Data quality back-checks in the regular SHARE Wave 8. In: Michael Bergmann & Axel Börsch-Supan (Eds.), *SHARE Wave 8 Methodology: Collecting cross-national survey data in times of COVID-19*, pp. 126-130. Munich: MEA, Max Planck Institute for Social Law and Social Policy.
- Hannemann, Tessa, Bergmann, Michael (2021b). Data quality back-checks in the first SHARE Corona Survey. In: Michael Bergmann & Axel Börsch-Supan (Eds.), *SHARE Wave 8 Methodology: Collecting cross-national survey data in times of COVID-19*, pp. 169-172. Munich: MEA, Max Planck Institute for Social Law and Social Policy.
- Hannemann, Tessa, Bergmann, Michael (forthcoming). Data quality back-checks in SHARE Wave 9. In: Michael Bergmann & Axel Börsch-Supan (Eds.), *SHARE Wave 9 Methodology*. Munich: MEA, Max Planck Institute for Social Law and Social Policy.
- Herold, Imke, Bergmann, Michael, Bethmann, Arne (2022). Trust in surveys, income non-response and linkage consent - the SHARE perspective. Presentation at the Workshop “Survey Climate and Trust in Scientific Surveys - Recent Developments and Controversial Issues.
- Scherpenzeel, A., Axt, K., Bergmann, M., Douhou, S., Oepen, A., Sand, G., Schuller, K., Stuck, S., Wagner, M., & Börsch-Supan, A. (2020). Collecting survey data among the 50+ population during the COVID-19 outbreak: The Survey of Health, Ageing and Retirement in Europe (SHARE).” In: *Survey Research Methods*, 14(2), 217-221. DOI: 10.18148/srm/2020.v14i2.7738.

## WP10: Electronic tools

### Objectives and tasks:

- To develop an adaptive testing tool
- To develop a web-based data & documentation tool

### Deliverables:

Number	Title	Status
D10.1	Upgraded suite of electronic tools for main survey of Wave 8	Delivered
D10.2	Upgraded suite of electronic tools for main survey of Wave 9	Delivered
D10.3	Upgraded suite of electronic tools for main survey of Wave 10	Pending

### Summary of progress:

- New Software Management System (CaseCTRL) and updated Sample Distributer (SampleCTRL) allow for mixed and multimode strategies
- Update of the Data and Documentation Tool (DDT) with both SHARE Corona Surveys

### Publications:

- De Bruijne, Marika, Pennings, Sebastian, & van der Wielen, Iggy (2021). Software innovations: Quest. In: Michael Bergmann & Axel Börsch-Supan (Eds.), *SHARE Wave 8 Methodology*. Munich: MEA, Max Planck Institute for Social Law and Social Policy. (available at: [http://www.share-project.org/fileadmin/pdf\\_documentation/MFRB\\_Wave8/SHARE\\_Methodenband\\_WEB.pdf](http://www.share-project.org/fileadmin/pdf_documentation/MFRB_Wave8/SHARE_Methodenband_WEB.pdf))

## WP11: Dissemination and communication

### Objectives and tasks:

- Schedule and organise all project conferences
- Create identity and disseminate information on SHARE objectives and participants
- Transmit the common communication strategy to all project participants and tailor dissemination activities to suit users/stakeholders
- Disseminate information on the project's outcomes and results to selected audiences

### Deliverables:

Number	Title	Status
D11.1	Midterm report on communication activities with collection of publications: findings, brochures etc. and evaluation of impact	Delivered
D11.2	Final report on communication activities with collection of publications: findings, brochures etc. and evaluation of impact	Pending

### Summary of progress:

- Conferences/meetings/workshops:
  - 13th SHARE-ERIC Council Meeting, online, 17 June 2021
  - SHARE Wave 10 Kick-off Meeting, online, 17-19 November 2021
  - SHARE MB/SMB Meeting, Munich, Germany, 19 November 2021
  - SHARE MEA - CentERdata Meeting, online, 1 December 2021
  - SHARE Wave 9 Mid-Term Meeting, online, 30-31 March 2022
  - 14th SHARE-ERIC Council Meeting, online, 17 May 2022
  - SHARE Wave 10 Preparation Meeting, Helsinki, Finland, 14-16 September 2022
  - 15 user workshops to promote SHARE data
- Dissemination activities:
  - Publication of two online newsletters to reach out to researchers
  - Publication of three "SHARE Findings Newsletter"
  - Maintenance of social media accounts (twitter, facebook)
  - Publication of 21 news messages and two press releases
  - Tracking and documentation of publications: more than 500 new SHARE papers were published during the reporting period
- Launch of the new SHARE website
  - <https://share-eric.eu>

**Publications:**

- SHARE-ERIC Annual Activity Report 2020/21, available under the following link: [http://www.share-project.org/fileadmin/pdf\\_documentation/SHARE-ERIC/SHARE\\_AnnualActivityReport2020\\_WEB.pdf](http://www.share-project.org/fileadmin/pdf_documentation/SHARE-ERIC/SHARE_AnnualActivityReport2020_WEB.pdf)
- SHARE-ERIC Annual Activity Report 2021/22, available under the following link: [http://www.share-project.org/fileadmin/pdf\\_documentation/SHARE-ERIC/SHARE-ERIC\\_AnnualActivityReport2021-22.pdf](http://www.share-project.org/fileadmin/pdf_documentation/SHARE-ERIC/SHARE-ERIC_AnnualActivityReport2021-22.pdf)
- SHARE Researcher Flyer (updated in September 2022), online available: [http://www.share-project.org/fileadmin/pdf\\_documentation/SHARE\\_Researcher\\_Flyer\\_2022\\_09\\_web.pdf](http://www.share-project.org/fileadmin/pdf_documentation/SHARE_Researcher_Flyer_2022_09_web.pdf)
- SHARE Policy Impact Flyer (updated in April 2022), online available: [http://www.share-project.org/fileadmin/2022\\_SHARE-flyer\\_Evidence-based\\_policy\\_making.pdf](http://www.share-project.org/fileadmin/2022_SHARE-flyer_Evidence-based_policy_making.pdf)