

# SHARE

**Monitoring, benchmarking and  
analysing population ageing**

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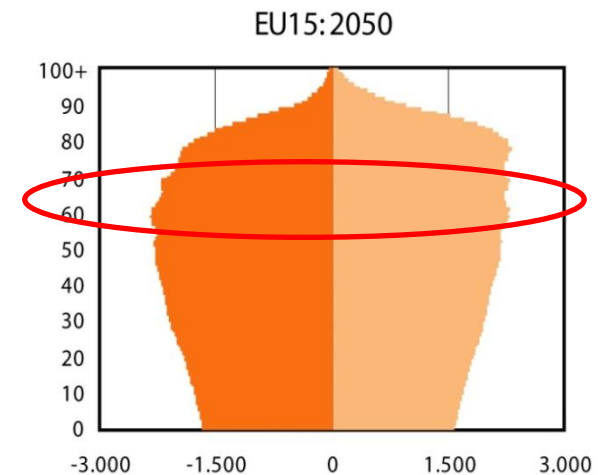
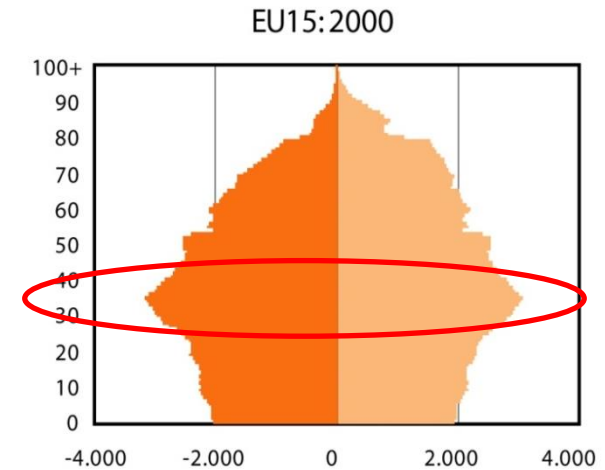
# What is SHARE

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- 1. Survey of Health, Ageing and Retirement in Europe**
- 2. Infrastructure to study the life-course interactions in the aging European welfare states:  
health – economics – social networks**
- 3. SHARE-ERIC was the first ERIC ever in 2011 and became an ESFRI landmark in 2016**

# Background

- ▶ Population ageing is one of *the* challenges of the **21<sup>st</sup> century** affecting:
  - ▶ Pensions, health and long-term care
  - ▶ Economic growth and living standards
  - ▶ Social (esp. intergenerational) cohesion
- ▶ *If we were physicists, we would do a **grand aging experiment with a country of your choice....***
- ▶ Build an observatory for **monitoring, analysing and benchmarking**
- ▶ Observatory in place for **retirement of baby boom** (and further economic crises)

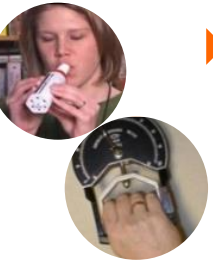


# What SHARE does:

- ▶ Representative samples of **individuals age 50+** with spouse
- ▶ **Face-to-face interviews** by trained interviewers every 2 years
- ▶ Broad range of **questions, measurements and tests:**



- ▶ **Socio-economic status:** labor force participation, retirement, income (amount and sources), wealth, housing, consumption, pension claims, expectations, well-being, **register links**



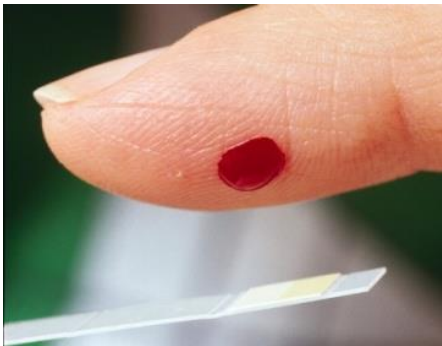
- ▶ **Health:** subjective-objective (self-report, ADL/IADL, conditions, physical performance tests, **biomarkers (HbA1c, CRP, cytokines, blood lipids)**, physical-mental (CES-D, Euro-D, cognition: MMSE, HCAP), health behaviors, health utilization and insurance coverage



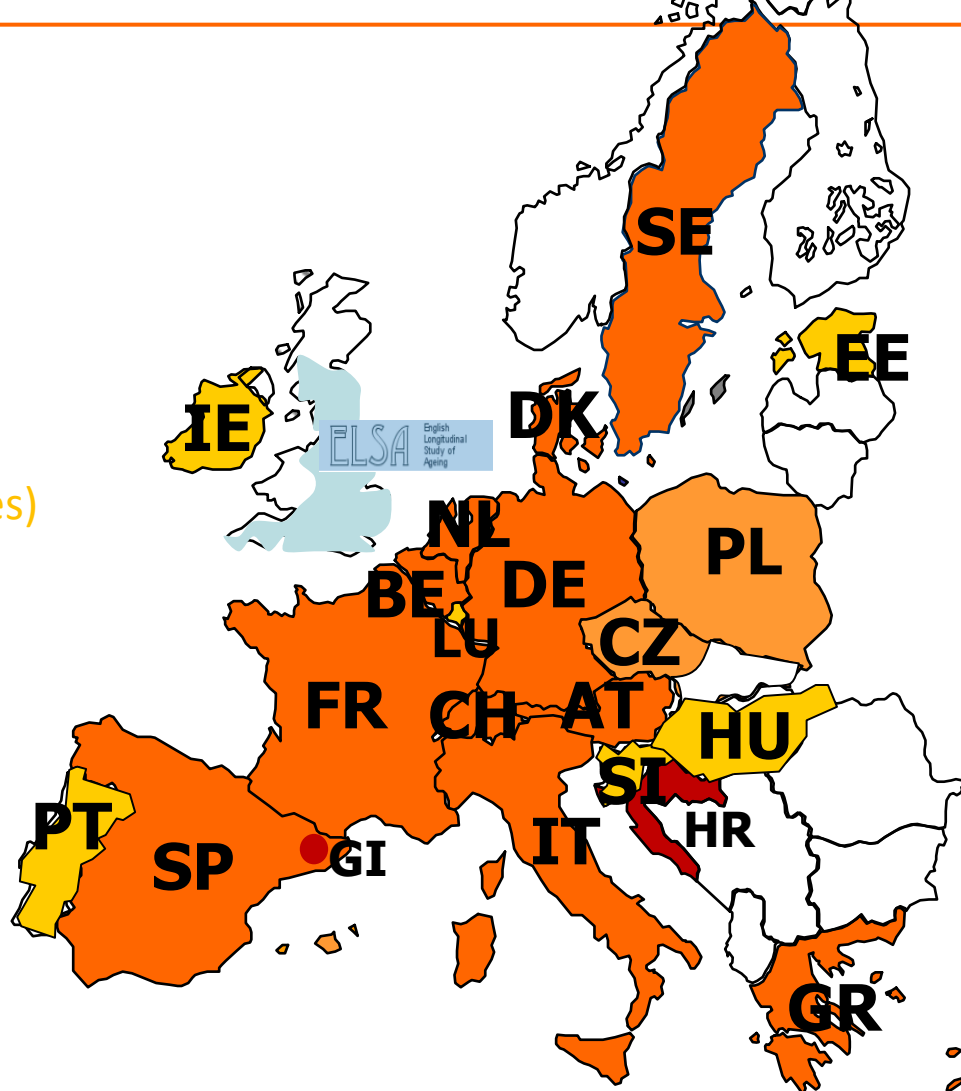
- ▶ **Social participation:** activities (volunteering), family and social networks (size and intensity), help (time, money)



**So far 6 „waves“ of data:**  
110,000 respondents,  
270,000 interviews  
in 21 countries + 1 region  
27,000 DBS (~95,000 punches)



**Mexico, Brazil,  
South Africa**





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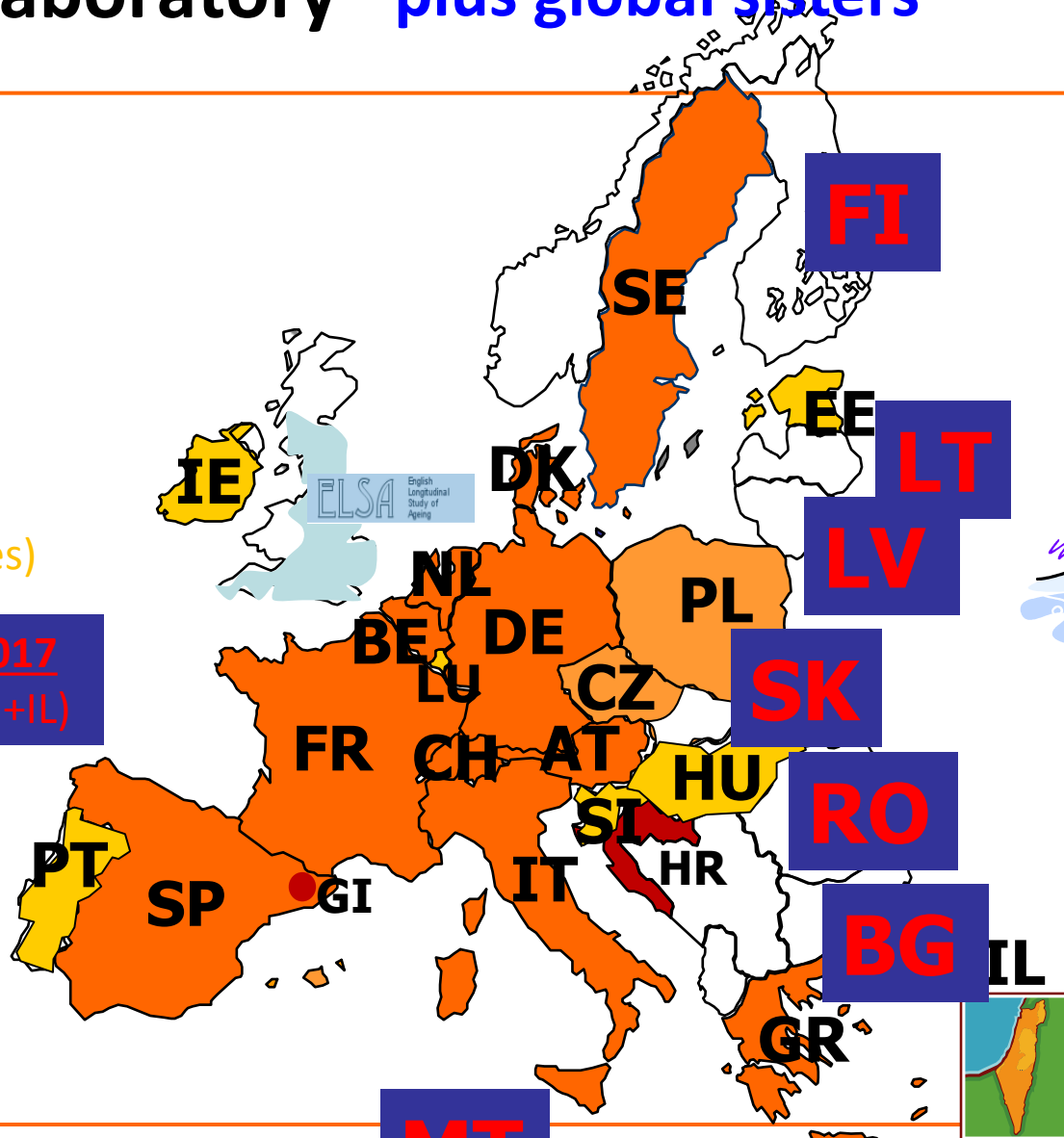
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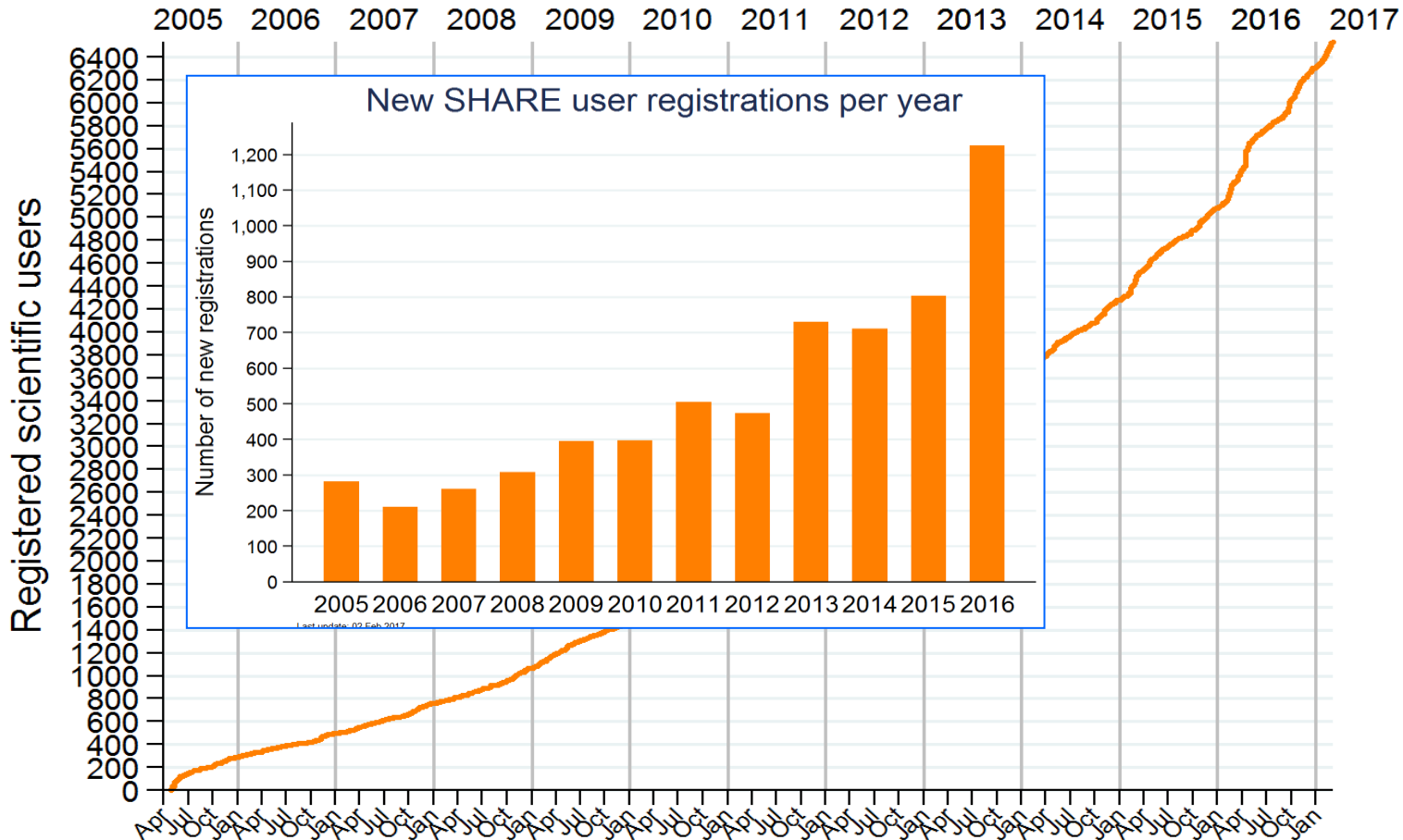
**Wave 7 has started in Jan 2017**

28 Countries (all ContEU+CH+IL)

72,000 life histories

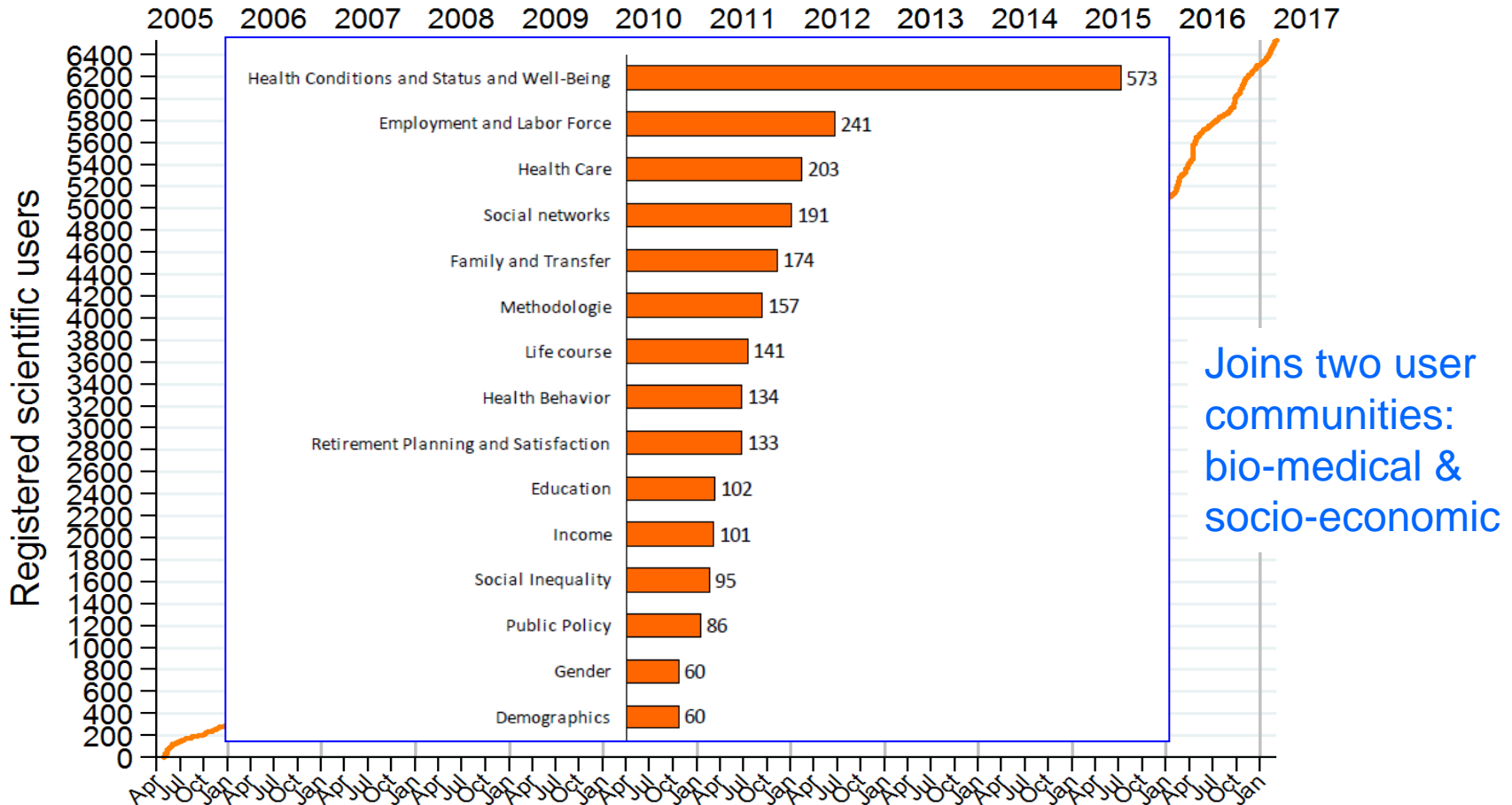


# Results: Users and publications



**Every two days a new publication, almost 1600 published until now**

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## SHARE has provided help for evidence-based policy making

### ▶ On the member state level:

- ▶ Czech Republic: Calibrate long-term care needs
- ▶ France: Retirement age and work conditions
- ▶ Italy: Old-age poverty and minimum pension
- ▶ Austria: Work conditions and preventive health care to increase retirement age
- ▶ Germany: Who is eligible for the new „retirement at 63“

### ▶ On the European level:

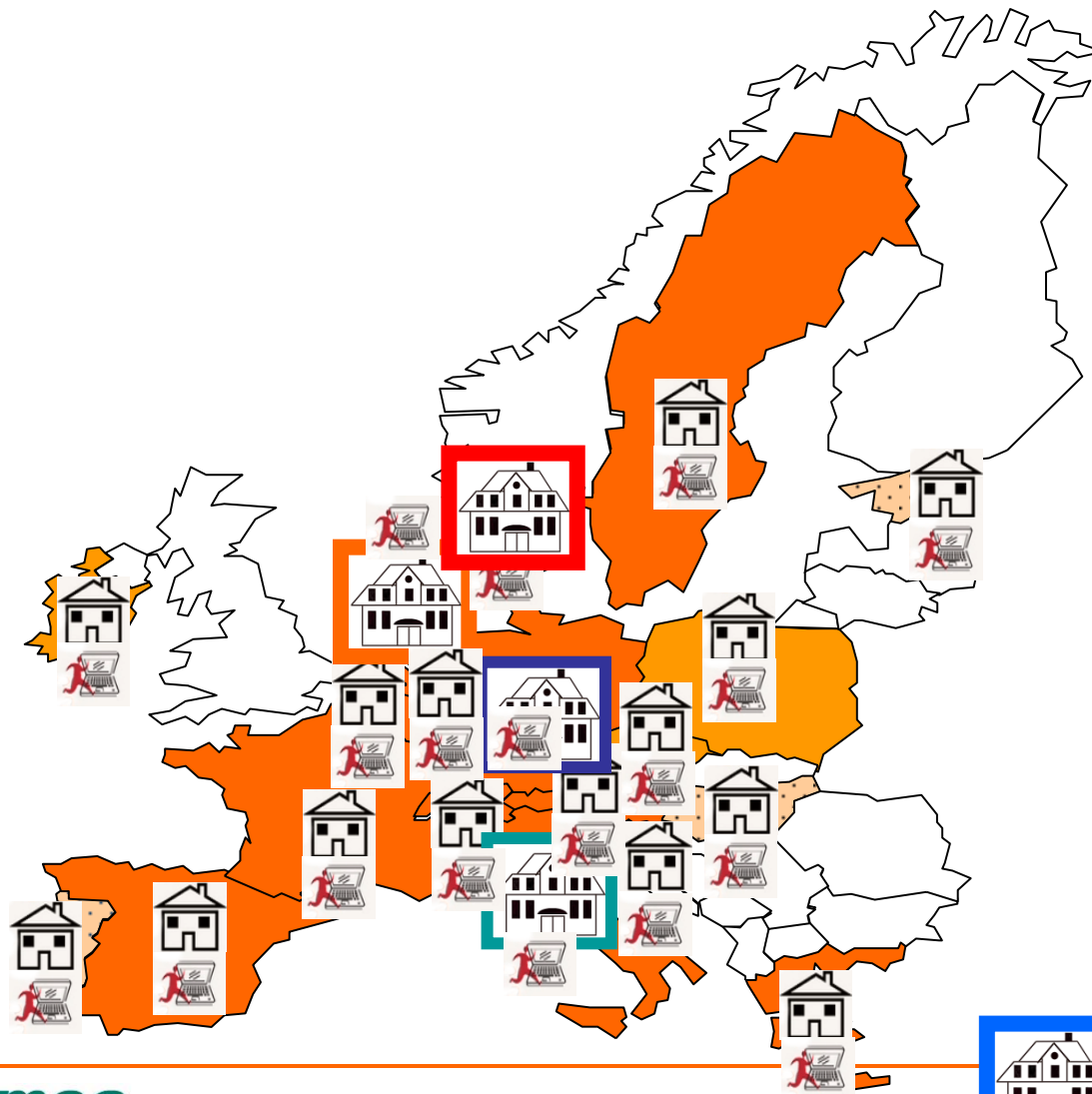
- ▶ DG ECFIN: Long-term projections of the „costs of population ageing“
- ▶ DG SANTE: Indicators to compute healthy life expectancy
- ▶ DG EMPL: European Innovation Partnership on Active and Healthy Ageing

### ▶ On the international level:

- ▶ OECD: Pensions at a Glance
- ▶ WHO: Healthy/active/disability-free life expectancies
- ▶ World Bank: (Re)migration corridors and social support

- ▶ **Very close cooperation with ESS:**
  - ▶ Common SERISS project
  - ▶ Joint electronic tools, sampling, survey methodology
  - ▶ in spite of different contents (ESS=opinions) and samples (SHARE=panel)
  
- ▶ **Specific cooperations:**
  - ▶ **CESSDA:** Archiving, data standards
  - ▶ **BBMRI:** Ritrain
  - ▶ **Infrafrontier:** Personnel administration
  - ▶ **CERIC:** Legal issues, biomarkers, MoU
  
- ▶ **Networks**

# Challenges: Organization



5 main nodes



28 country scientific partner institutions



31 independent survey agencies & about 2500 mostly free-lance interviewers

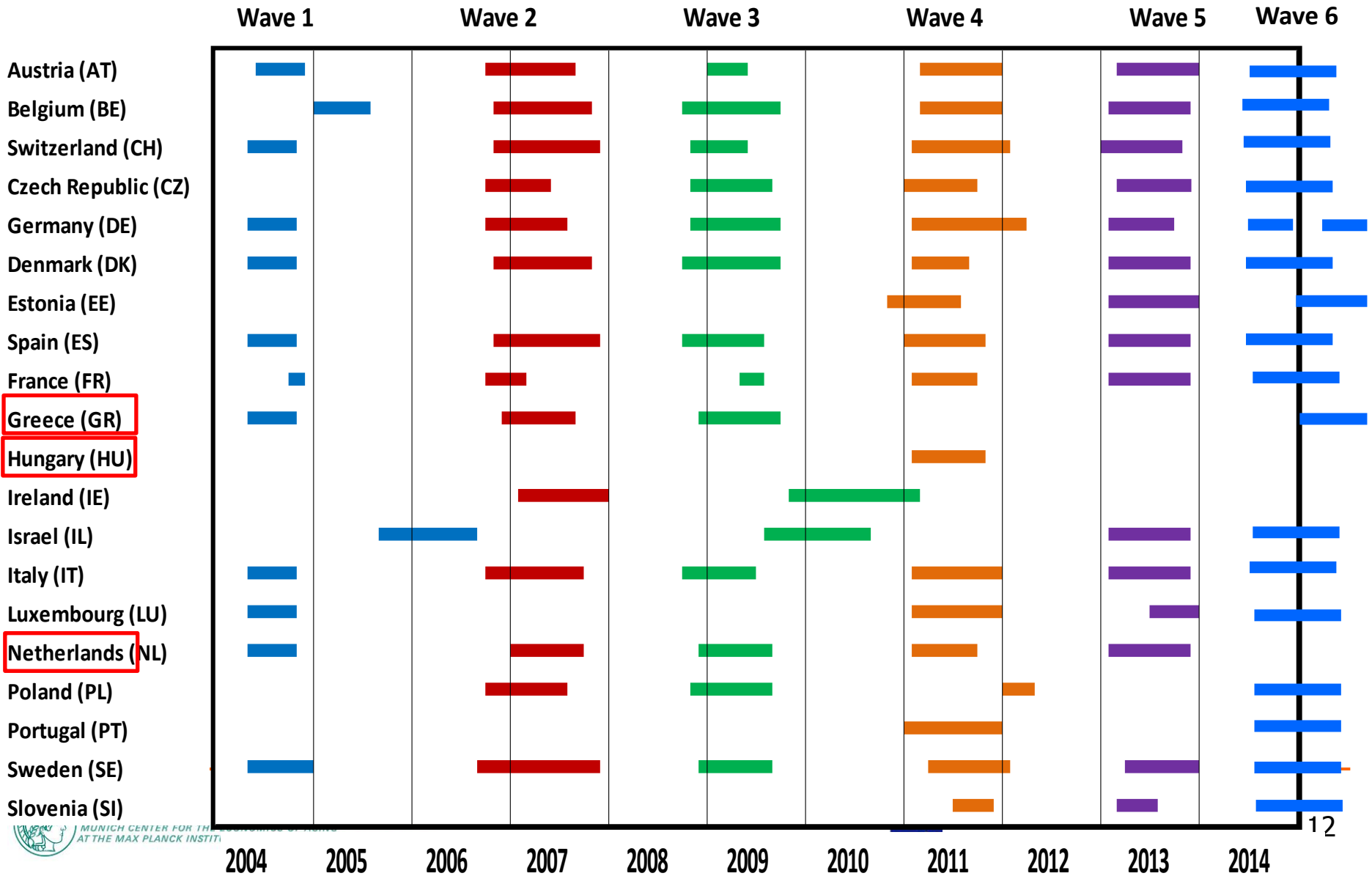
**57 funding sources**

**Central: COM, BMBF, NIA (~20%)**

**But ~80% decentral...**



# Country participation



# Did the ERIC achieve its aims?

## SHARE-ERIC experience since 2011:

- ▶ Stable governance structure thanks to ERIC ✓
- ▶ Close cooperation between ERICs ✓
- ▶ Stable funding in **most but not all core** countries ✓
- ▶ **Very** unstable funding in new and crisis countries due to austerity regimes 👎
- ▶ Unstable funding in *some* rich countries: Mismatch national structures 👎
- ▶ **Unstable funding of coordination activities and software development** 👎
- ▶ Need of central role of EU COM complementing ESFRI decentralization 👎
- ▶ Need of long-term funding mechanism. ERIC commitments do not suffice 👎
- ▶ Backfires also on career paths of young researchers who design and maintain SHARE 👎

**Lack of sustainable funding undermines the European value of SHARE**

# Summary

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- 1. SHARE is an infrastructure to study life-course interactions in the aging European welfare states:** Joins biomedical with socio-economic research.
- 2. Success:** widely used, salient results, policy relevance at EU and MS levels. Recent scientific evaluation.
- 3. Observatory:** SHARE is a little Europe in the large and historical European Union challenge.
- 4. Sustainability:** SHARE *urgently* needs a new centralized funding model.

# Summary

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**Sustainability and financial stability**

**Governance and scientific success**

# THANK YOU

centralized funding model.

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