

PROJECT FINAL REPORT

"Publishable"

Grant Agreement number: 211909

Project acronym: SHARE-PREP

Project title: Major Upgrade of the Survey of Health, Ageing and Retirement in Europe – preparatory phase

Funding Scheme: COMBINATION OF COLLABORATIVE PROJECT AND COORDINATION AND SUPPORT ACTION

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¹ Usually the contact person of the coordinator as specified in Art. 8.1. of the grant agreement

² The home page of the website should contain the generic European flag and the FP7 logo which are available in electronic format at the Europa website (logo of the European flag: http://europa.eu/abc/symbols/emblem/index_en.htm ; logo of the 7th FP: http://ec.europa.eu/research/fp7/index_en.cfm?pg=logos). The area of activity of the project should also be mentioned.

4.1 Final publishable summary report

This is a comprehensive summary of results, conclusions and the socio-economic impacts of the project. The publishable report shall be formatted to be printed as a stand alone paper document. This report should address a wide audience, including the general public.

Please ensure that it:

- *Is of suitable quality to enable direct publication by the Commission.*
- *Is comprehensive, and describes the work carried out to achieve the project's objectives; the main results, conclusions and their potential impact and use (including the socio-economic impact and the wider societal implications of the project). Please mention any target groups such as policy makers or civil society for whom the research could be relevant.*
- *Includes where appropriate, diagrams or photographs and the project logo, illustrating and promoting the work of the project.*
- *Provides the following information:*
 - *List of all beneficiaries with the corresponding contact name and associated coordinates*
 - *The address of the public Website of the Project as well as relevant contact details.*

Project logo & website



<http://www.share-project.org/prep>

a) Project summary

The Survey of Health, Ageing and Retirement in Europe (SHARE) has been selected by the ESFRI roadmap process as one of the 35 crucial pillars of the European Research Area. This project prepares a major upgrade of SHARE for all 27 EU members plus associated Switzerland and Israel in order to create a bi-annual panel survey during the decade 2010-2020.

SHARE builds an *infrastructure of micro data* necessary to understand individual and societal ageing as a process in time that is strongly influenced by pension, health care and labour market regimes and their reforms. It is designed by researchers for researchers and integrates economics, medicine, and social sciences. Research based on this infrastructure will also serve as a feedback mechanism to support fact-based EU policies, such as the open method of coordination and the Lisbon agenda, to help meeting the challenges of population ageing in all countries of the EU.

The major upgrade of SHARE has two dimensions. First, it will *prolong SHARE over time* and generate a genuine 8 wave panel that follows individuals for up to 15 years as they age and react to the changes in the social and economic environment. From a research viewpoint, the time dimension is crucial since ageing is a process that can only be understood if we observe the same individual at different points in time. Second, SHARE will *expand to all EU member states*. Ageing in the accession states is a particular challenge as these countries are ageing before their social and health institutions are brought to the same level of maturity as in the EU15 countries.

Aim of the preparatory phase is to bring the SHARE prototype to the level of financial, legal, governance and technical maturity required to fill important knowledge gaps in individual and population ageing. It involves *all stakeholders necessary for the major upgrade*, among them research institutes and universities; national science ministries and foundations; two Directorates General of the European Commission; and the U.S. National Institute on Aging. Most important tangible outcome of this negotiation process is a *memorandum of understanding* as the foundation for a sustainable cooperation of the stakeholders and the *statutes* of the SHARE-ERIC.

b) List of beneficiaries

Country team	Participating Organisation	Short description of relevant parties and specific role in the Preparatory Phase
Germany (Coord.)	University of Mannheim, Mannheim Res. Inst. for the Economics of Aging (MEA)	MEA is a world-renowned centre of excellence for the economics of ageing. Research areas are savings, social insurance and public policy; macroeconomic implications of population ageing; and public health. MEA is represented by Axel Börsch-Supan , director, who has coordinated the SHARE family of projects and will also coordinate this project. In this preparatory phase project, MEA was responsible for central work packages 1, 2, 4 and 5 (management of contract, internal coordination, strategic and financial work), and for the German part of work packages 2, 3, 4, 5 and 6.
Austria	University of Linz, Dept. of Economics	The Department of Economics at the University of Linz directs the Austrian participation in the SHARE project. Its research focus being is labour economics, public economics and problems of pension reform as well environmental economics. It will be represented by the Rudolf Winter-Ebmer , Professor of Economics and specialist in empirical labour economics. The University of Linz was responsible for the Austrian part of work packages 2, 3, 4, 5 and 6.
Belgium	University of Antwerp, CSP	CSP's principal objective has been to study the adequacy of social policies. Its research is mainly based on large-scale socio-economic surveys of households. Karel van den Bosch , senior researcher, lead the Belgian country team, being responsible for the Belgian part of work packages 2, 3, 4, 5 and 6.
	University of Liège, CREPP	CREPP's main fields of specialisation are social security, retirement behaviour, and well-being among the elderly and intergenerational transfers. Sergio Perelman was in charge of the SHARE project coordination in the Belgian French speaking community and assisted CSP in part of work packages 2, 3, 4, 5 and 6.
Czech Rep.	CERGE-EI, Prague	CERGE-EI is fully accredited in both the United States and the Czech Republic. Its main expertise is in social, economic and political transition in the Central and Eastern European countries and in the former Soviet Union region. Radim Bohacek lead the Czech country team, being responsible for the Czech part of work packages 2, 3, 4, 5 and 6.
Denmark	University of Southern Denmark, Institute of Public Health, Odense	The Institute of Public Health is located at the Medical Faculty of the University of Southern Denmark, Odense. The section of epidemiology comprises expertise in ageing research, clinical epidemiology, twin research, and medical demography. It is represented by Kaare Christensen , Professor of Epidemiology, and lecturer Karen Andersen-Ranberg . The Institute of Public Health was be responsible for the Danish part of work packages 2, 3, 4, 5 and 6

France	IRDES, Paris	IRDES's multidisciplinary team monitors and analyses trends in the behaviour of consumers and health care professionals from a medical, economic, geographic and sociological perspective. Thierry Debrand lead the French country team in close cooperation with Anne Laferrère , SHARE country team leader for wave 2, and administrateur de l'INSEE. IRDES was be responsible for the French part of work packages 2, 3, 4, 5 and 6
Greece	Panteion University, Regional Development Institute, Athens	The Regional Development Institute advances of the research in all fields of the developmental process. This is achieved by linking urban, local and regional development issues with broader National and EU processes. Antigone Lyberaki lead the Greek country team, being responsible for the Greek part of work packages 2, 3, 4, 5 and 6
Ireland	Geary Institute, University College Dublin	The Geary Institute comprises some 30 economists, psychologists, political scientists and other researchers. The research uses microeconometrics and microeconomics, psychometrics, qualitative/mixed methods and web based surveys - maximizing the potential for interdisciplinary collaboration. It houses the Irish Social Science Data Archive. UCD is represented by Colm Harmon , Director, leading the Irish part of work packages 2, 3, 4, 5 and 6
Israel	Israel Gerontological Data Center (IGDC), Hebrew University in Jerusalem	The IGDC is a knowledge centre funded by the Israeli Ministry of Science and Technology. It promotes analysis of the dynamics of ageing and their social, economic and health-related concomitants. It is represented by Howard Litwin , Professor of Social Gerontology, who lead the Israeli country team and is responsible for the Israeli part of work packages 2, 3, 4, 5 and 6
Italy	University of Padua, Dept. of Economics,	Padua's Economics Department covers the whole spectrum of economics and management science, in particular applied econometrics, public and health economics as well as labour economics. Core group member Guglielmo Weber lead the Italian country team and is responsible for central WP 6 (governance) as well Italians WPs 2,3,4 and 5.
	University of Venice, Department of Economics	Venice's Department of Economics has a long-standing tradition in applied microeconomic research. It has been for several years a node in EU sponsored projects on saving, retirement and ageing. It is represented by core group member Agar Brugiavini . The University of Venice was be responsible for central work package 3 (external communications) and WP8 (information platform) as well the nodes part of internal communication (WP2).
The Netherlands	University of Tilburg, CentER,	CentER is the research institute of the Faculty of Economics and Business Administration of Tilburg University. It is an internationally oriented research institute, covering all fields in economics and business administration. Frank van der Duyn Schouten lead the Dutch country team. CentER was also responsible for the legal and ethical work envisaged in WP7. CentER was be responsible for the Dutch part of work packages 2, 3, 4, 5 and 6
Poland	Warsaw University, Dept. of Economics	Warsaw's Department of Economics at is one of the best centres for academic research, teaching and policy advice in the country. Prof. Marian Wiśniewski lead the country team in close cooperation with Michał Myck , Senior Research Economist at the DIW-Berlin, who has supervised the data collection in Poland. Warsaw University will be responsible for the Polish part of work packages 2, 3, 4, 5 and 6
Slovenia	Institute for Economic Research (IER), Ljubljana	IER , founded in 1955, has a long tradition in research in welfare economics and human resources covering social security; poverty, income distribution and inequality; economics of education; health economics; inter-generational transfers of income; economic aspects of population and family policies. IER is represented by Boris Majcen , Director of the Institute, who was responsible for the Slovenian part of work packages 2, 3 and 6
Spain	CEMFI, Madrid	CEMFI is a graduate school set up by Bank of Spain as a non-profit independent foundation. Its goals are research in all fields of Economics and Finance. It has a full time faculty of ten professors, which includes an active group of researchers with specific empirical interests in consumption, savings, labour markets and population economics. Pedro Mira lead the Spanish country team, being responsible for the Spanish part of work packages 2, 3, 4, 5 and 6

Sweden	University of Lund, Lund University Centre for Health Economics (LUCHE)	LUCHE was established in 1998 in order to develop research capacity and competitive strength in the field of health economics. It provides a forum for researchers in health economics, maintains and develops an international health-economics network, and acts as a point of contact in relation to research councils and other external parties. Profs. Kristian Bolin and Annika Sunden lead the Swedish country team, being responsible for the Swedish part of work packages 2, 3, 4, 5 and 6
Switzerland	University of Lausanne, Institute of Health Economics and Management (IEMS)	IEMS is an interdisciplinary institute created in order to reinforce synergy between Health Economics and Management related disciplines - Economics, Management, Medicine, Public Health, Sociology/Anthropology, Demography and Law- and to promote advanced training and high quality research in Health Economics. Alberto Holly , Director of IEMS, lead the Swiss country team, being responsible for the Swiss part of work packages 2, 3, 4, 5 and 6