

## Prof. Dr. Charlotte Bartels

Ludwig-Maximilians-Universität München  
Seminar für Komparative Wirtschaftsforschung  
Akademiestr. 1 (III. Stock)  
80799 München  
Married, two children (07/2016, 10/2019)

## Curriculum Vitae

E-Mail: charlotte.bartels@lmu.de  
Phone: +49 89 2180 2519

<https://sites.google.com/site/charlottedsbartels>

### POSITIONS

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- 10/2023 – 03/2024 Interim W3 Professorship in Microeconomics (Prof. Monika Schnitzer), **LMU**
- 09/2021 – 06/2022 John F. Kennedy Fellow at the Center for European Studies, **Harvard University**
- 01/2020 – 06/2020 Visiting Associate Professor, **City University New York (CUNY)**
- 08/2015 – current Research Associate, SOEP research infrastructure, **DIW Berlin**
- 01/2013 – 07/2015 Research Associate, Chair of Public Finance and Social Policy, **Freie Universitaet Berlin**
- 06/2009 – 12/2012 Research Assistant, Chair of Macroeconomics, **Freie Universitaet Berlin**

### EDUCATION

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- 2009 – 2013 **Dr. rer. pol. (equiv. PhD) in Economics** (summa cum laude),  
Title: "Insurance and incentives in the German welfare state"  
Supervisor: Giacomo Corneo, *Freie Universitaet Berlin*
- 2004 – 2009 **Diplom (equiv. MSc.) in Economics** (with distinction), *Freie Universitaet Berlin* and  
*Universidade Federal do Rio de Janeiro*, Brazil

### RESEARCH VISITS

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- 04/2023 **École normale supérieure de Lyon**, Department of Economics  
(invited by Laurent Simula and Jonathan Goupille-Lebret)
- 09/2018 – 12/2018 **University of California, Berkeley**, Department of Economics  
(invited by Emmanuel Saez)
- 02/2015 – 04/2015 **Uppsala University**, Department of Economics  
(invited by Daniel Waldenström)

### AFFILIATIONS

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CEPR, CESifo, IZA, Uppsala Center for Fiscal Studies (UCFS), World Inequality Lab (WIL), GC Wealth Project CUNY,  
EU Tax Observatory, Social Policy and Economic History Committee of Verein für Socialpolitik

### AWARDS AND SCHOLARSHIPS

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- 2018 Travel grant for a research visit at University of California, Berkeley, *Fritz Thyssen Foundation*
- 2015 *Roman Herzog Award 2015* for Social Market Economy Research
- 2015 *Wolfgang-Ritter-Award 2015* for doctoral thesis
- 2015 Full scholarship for a research visit at Uppsala University, *Fritz Thyssen Foundation*
- 2005-2009 Student scholarship (Journalism Academy), *Konrad Adenauer Foundation*

## PROFESSIONAL RESPONSIBILITIES

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06/2023 – 05/2026	PI of EQUITAX, DFG-ANR project with ENS Lyon, 310,000€
01/2023 – 09/2024	PI of Wealth Accumulation in Germany, BMAS, 75,000€
01/2023 – 12/2024	Co-PI of Role of Inheritances for Wealth Inequality, HBS, 250,000€
01/2023 – 12/2024	Co-PI of DINA for Germany, HBS, 350,000€
04/2020 – 12/2023	Co-PI of WATT, DFG, 40,000€
05/2015 – 01/2019	Assistant Editor, <i>Journal of Income Distribution</i>
01/2013 – 07/2015	Coordinator, PhD program “Public Economics and Inequality”, <i>Freie Universitaet Berlin</i>

## PUBLICATIONS

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### A. ARTICLES IN REFEREED JOURNALS

Long-term effects of equal sharing: Evidence from inheritance rules for land (with S. Jäger and N. Obergruber), NBER Working Paper No. 28230, accepted at **Economic Journal**.

Testing Marx. Income inequality, concentration and socialism in late 19th century Germany (with F. Kersting and N. Wolf), **Review of Economics and Statistics**, [https://doi.org/10.1162/rest\\_a\\_01305](https://doi.org/10.1162/rest_a_01305).

Accounting for pension wealth, the missing rich and under-coverage: A comprehensive wealth distribution for Germany (with T. Bönke, R. Glaubitz, M. Grabka and C. Schröder), **Economics Letters** 231 (2023), 111299.

Drivers of participation elasticities across Europe: gender or earner role within the household? (with C. Shupe), **International Tax and Public Finance** 30 (2023), 167-214.

Insurance and redistribution around the world (with D. Neumann), **Scandinavian Journal of Economics**, 123(4) (2021), 1116-1158.

A tale of two countries: The long shadow of the crisis on income and wealth in Germany and Italy (with S. Morelli), in: Forum The Financial crisis - Is it history?, **Journal of Modern European History** 19(1) (2021), 33-39.

A Novel Sampling Strategy for Surveying High-Worth Individuals - An Application Using the Socio-Economic Panel (with C. Schröder, M. Grabka, M. Kroh and R. Siegers), **Review of Income and Wealth** 66(4) (2020), 825-849.

Top incomes in Germany, 1871-2014, **Journal of Economic History** 79(3) (2019), 669-707.

An integrated approach for a top-corrected income distribution (with M. Metzging), **Journal of Economic Inequality** 17(2) (2019), 125-143.

Children's opportunities in Germany - An application using multidimensional measures (with M. Stockhausen), **German Economic Review** 18(3) (2017), 327-376.

Short- and long-term participation tax rates and their impact on labor supply (with N. Pestel), **International Tax and Public Finance** 23(6) (2016), 1126-1159.

Can households and welfare states mitigate rising earnings instability? (with T. Bönke), **Review of Income and Wealth** 59(2) (2013), 250-282.

Redistribution and insurance in the German welfare state, **Schmollers Jahrbuch/Journal of Applied Social Science Studies** 132(2) (2012), 265-295.

### B. MONOGRAPHS

Versicherung und Anreize im deutschen Wohlfahrtsstaat, Springer Gabler, (2014).

## C. DISCUSSION PAPERS

**Wealth and its distribution in Germany, 1895-2018** (with T. Albers and M. Schularick), CEPR Working Paper No.17269. (Revise & Resubmit at **Journal of the European Economic Association**)

**Wealth creator or inheritor? Unpacking the gender wealth gap from bottom to top and young to old** (with C. Schröder and E. Sierminska), <http://dx.doi.org/10.2139/ssrn.4422891>.

**Distributional National Accounts (DINA) for Germany, 1992-2016** (with S. Bach and T. Neef), <http://dx.doi.org/10.2139/ssrn.4487665>.

## D. BOOK REVIEWS

Review of "The Society of Equals", Pierre Rosanvallon, **Journal of Economics** 113(3) (2014), 299-303.

## E. BOOK CHAPTER

**Inequality and its drivers in Germany, 1840–1914** (with Thilo Albers), in: Pfister, U. and N. Wolf (eds.): *An Economic History of the First German Unification*, Routledge, 2023.

**Einkommen, Vermögen und ökonomische Ungleichheit** (with Jan-Ottmar Hesse), in: Rahlf, Thomas (ed.): *Deutschland in Daten - Zeitreihen zur Historischen Statistik*, Bonn: Bundeszentrale für politische Bildung, 2022.

**Top incomes and inequality** (with D. Waldenström), in: Zimmermann, K.F. (ed.): *Handbook of Labor, Human Resources and Population Economics*, Springer, 2022.

**Phasen und Beweggründe der Ungleichheit in Deutschland von 1840 bis 1914** (with T. Albers), in: Hesse, J.-O., Pfister, U., Spoerer, M. and N. Wolf (eds.): *Deutschland 1871: Die Nationalstaatsgründung und der Weg in die moderne Wirtschaft*, Tübingen: Mohr Siebeck, 2021, 291-312

**Distributional National Accounts: A Macro-Micro Approach to Inequality in Germany** (with S. Bach and T. Neef), in: Chetty, R., Friedman, J. N., Gornick, J.C., Johnson, B. and A. Kennickell (eds.): *Measuring distribution and mobility of income and wealth*, 2021, University of Chicago Press.

## F. SELECTED POLICY CONTRIBUTIONS AND NON-REFEREED JOURNALS

Immobilien und Ungleichheit (with L. Maaßen), **Vierteljahreshefte der Wirtschaftsforschung** 91, 2022, 39-52.

Die Bedeutung von Mieteinkommen und Immobilien für die Ungleichheit in Deutschland (with C. Schröder), **Wirtschaftsdienst** 10, 2020, 741-746.

The role of rental income, real estate and rents for inequality in Germany (with C. Schröder), **Forum New Economy - Basic Paper** 03/2020.

Steigende Polarisierung der Markteinkommen, in: *Ungleichheit unter der Lupe – neue politische Antworten auf ein bekanntes Thema*, **ifo Schnelldienst** 73 (02), 2020, 03-26.

Income, consumption and wealth inequality in Germany: Three concepts, three stories? (with C. Schröder), **Forum New Economy - Basic Paper** 02/2020.

Einkommensverteilung in Deutschland, **DIW-Wochenbericht** Nr. 3/2018.

Trends in global income inequality – Germany, in: Alvaredo, F., Chancel, L., Piketty, T., Saez, E. and G. Zucman (eds.): **World Inequality Report 2018**, World Inequality Lab, Paris.

Development of Top Incomes in Germany since 2001 (with C. Schröder), **DIW Economic Bulletin** Nr.1/2/2016.

The role of capital income for top income shares in Germany (with K. Jenderny), **World Top Incomes Database (WTID) Working Paper** Nr.1/2015.

## **G. WORK IN PROGRESS**

**Born in the land of milk and honey: hometown growth and individual wealth accumulation**

(with J. König and C. Schröder)

**Inheritance taxes and family firms in Germany** (with T. Bührle, K. Holzheu and G. Locks)

**Do business tax rates affect real investment? Evidence from the local business tax in Germany**

(with S. Eichfelder, J. Knaisch and C. Pöschel)

**Inequality and voting** (with T. Rieger)

**When capitalism takes over socialism: the lasting economic divide between East and West Germany**

(with T. Neef)

## **PRESENTATIONS**

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### **INVITED TALKS**

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| 2024 | EconTribute Seminar, University of Cologne (scheduled)<br>ReStart Talk, University of Cologne (scheduled)<br>Inequality in Rome seminar, University Roma Tre (scheduled)  |
| 2023 | Keynote on "Growth and the 'sociale Frage'", Jahrestagung Verein für Socialpolitik<br>Economics and Sustainability Research Seminar, University of Regensburg<br>ECARES Seminar, Université libre de Bruxelles<br>Economic Research Seminar, University of Magdeburg<br>Research Seminar, Max Planck Institute for the Study of Societies<br>Ludwig Erhard ifo Research Seminar<br>Economic Research Seminar, University of Bayreuth<br>Economic History Seminar, University of Pennsylvania<br>Economic History Seminar, Columbia University |
| 2022 | Research Seminar in Public Economics, LMU Munich<br>Research Seminar in Economics, University of Tübingen<br>Research on Europe, Center for European Studies, Harvard University<br>Economic History Workshop, Harvard University<br>Institute for International Economic Policy, George Washington University<br>Public Finance/Labor Workshop, Harvard University<br>Workshop "Socioeconomics of housing and finance", JFKI, Freie Universitaet Berlin  |
| 2021 | ifo Center for the Economics of Education Seminar<br>Seminar for Social and Economic History, Goethe University of Frankfurt<br>Economic History Seminar, University of Münster<br>Economic History Seminar, University of Mannheim<br>Lecture series Inequality, John-F.-Kennedy Institute, Freie Universitaet Berlin<br>Research Seminar in Economics, University of Hohenheim<br>Economic History Seminar, New York University (NYU)<br>Research Seminar, Potsdam Institute for Climate Impact Research (PIK)                              |
| 2020 | Economic History, Growth & Development Seminar, University Halle<br>Determinants of Wealth Inequality Workshop, University St. Gallen<br>Economic History Seminar, Universidad Carlos III de Madrid   |

- Online Workshop on Wealth Taxation, University of Düsseldorf  
 European Macro History Online Seminar  
*Economic History Seminar, Paris School of Economics (cancelled because of pandemic)*  
*Advanced Research Collaborative, City University New York (cancelled because of pandemic)*  
*Lecture series on Polarization, University of Bonn (cancelled because of pandemic)*
- 2019 Richard C. Holbrooke Workshop, American Academy Berlin  
 Economic History Seminar, University of Bayreuth
- 2018 Public Economics Seminar, University of California, Berkeley  
 Economics Brown Bag Seminar, University of Nevada, Reno  
 New Economics Paradigm Workshop, Berlin  
 Research Seminar in Economics, Freie Universitaet Berlin  
 Lecture series on *Work, wages and income distribution*, University of Göttingen
- 2017 Current Research Topics in Economics, Berlin School of Economics and Law
- 2016 Berlin Colloquium in Economic History, Humboldt University  
 MacroHistory Seminar, University of Bonn  
 Applied Economics Seminar, Paris School of Economics  
 Welfare Economics Seminar, CORE, Université Catholique Louvain  
 Lecture series on *Work, wages and income distribution*, University of Göttingen
- 2015 UCFS Public Economics Seminar, Uppsala University  
 Research Department Seminar, Statistics Norway  
 Workshop on Measuring Inequalities of Income and Wealth (*organized by  
 OECD, Bertelsmann Stiftung and High Level Expert Group on the  
 Measurement of Economic Performance and Social Progress*)  
 SOCIUM Seminar, University of Bremen
- 2014 Brown Bag Seminar, Department of Economics, University of Konstanz

## CONFERENCES

- 2023 Verein für Socialpolitik, 78th Congress of the International Institute of Public Finance (IIPF), Economic History Congress, Leipzig
- 2022 6<sup>th</sup> Household Finance Workshop; Verein für Socialpolitik, 77<sup>th</sup> Congress of the International Institute of Public Finance (IIPF)
- 2021 2<sup>nd</sup> World Inequality Conference; NBER Summer Meeting; Verein für Socialpolitik, 77<sup>th</sup> Congress of the International Institute of Public Finance (IIPF); 20<sup>th</sup> Louis-André Gérard-Varet (LAGV) public economics conference; 7<sup>th</sup> Meeting of the ECINEQ Society; Household Finance Conference at Deutsche Bundesbank
- 2020 Verein für Socialpolitik, 76<sup>th</sup> Congress of the International Institute of Public Finance (IIPF) (online), NBER-CRIW conference on Measuring and Understanding the Distribution and Intra/Inter-Generational Mobility of Income and Wealth, Washington
- 2019 JHPS user conference, Tokyo, Japan; 7<sup>th</sup> Meeting of the ECINEQ Society, Paris, France; Workshop for Women in Macroeconomics, Finance, and Economic History, Berlin
- 2018 LIS user conference, Luxemburg; 74<sup>th</sup> Congress of the International Institute of Public Finance (IIPF), Tampere, Finland; World Economic History Congress, Boston, USA
- 2017 First WID.world conference, Paris School of Economics; SIMDECO workshop, LISER, Luxemburg; ZEW Public Finance Conference, Mannheim; 6<sup>th</sup> Meeting of the ECINEQ Society, New York, USA
- 2016 11<sup>th</sup> Winterschool on Inequality and Social Welfare Theory, Canazei, Italy
- 2015 71<sup>th</sup> Congress of the International Institute of Public Finance (IIPF), Dublin, Ireland; 6<sup>th</sup> Meeting of the ECINEQ Society, Luxembourg
- 2014 70<sup>th</sup> Congress of the International Institute of Public Finance (IIPF); Lugano, Italy; 4<sup>th</sup> SEEK Conference, ZEW, Mannheim, Germany; Conference on Crises and the Distribution, Berlin, Germany; 13<sup>th</sup> Finanzwissenschaftlicher Workshop, Berlin
- 2013 69<sup>th</sup> Congress of the International Institute of Public Finance (IIPF), Taormina, Italy; 5<sup>th</sup> Meeting of the ECINEQ Society, Bari, Italy
- 2012 Jahrestagung des Vereins für Socialpolitik, Göttingen, Germany; 11<sup>th</sup> Meeting of the Society for Social Choice and Welfare (SSCW), New Delhi, India
- 2011 Workshop zur Erstnutzung des Datensatzes "Biographiedaten ausgewählter Sozialversicherungsträger in Deutschland (BASiD)", Berlin, Germany; 67<sup>th</sup> Congress of the

International Institute of Public Finance (IIPF), Ann Arbor, USA; 4<sup>th</sup> Meeting of the Society for the Study of Economic Inequality (ECINEQ), Catania, Italy; 8<sup>th</sup> FDZ-Rentenversicherung Workshop, Kiel, Germany

2010 66<sup>th</sup> Congress of the International Institute of Public Finance (IIPF), Uppsala

2009 3<sup>rd</sup> Meeting of the Society for the Study of Economic Inequality (ECINEQ), Buenos Aires, Argentina

## REFEREEING

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B.E. Journal of Economic Analysis and Policy, Economic Journal, Economic Policy, Economics Letters, European Journal of Political Economy, European Review of Economic History, Explorations in Economic History, International Review of Economics, International Tax and Public Finance, Journal of Economic History, Journal of Economic Inequality, Journal of Income Distribution, Journal of Institutional Economics, Journal of Public Economics, Oxford Bulletin of Economics and Statistics, Research on Economic Inequality, Review of Economics and Statistics, Review of Income and Wealth, Scandinavian Economic History Review, Quarterly Journal of Economics

## LECTURES, SEMINARS AND TUTORIALS

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**Microeconomics** (Lecture, Master LMU, Winter 23), **Wealth and Taxation** (Seminar, Bachelor LMU, 23), **Taxation** (Lecture, Master FU, Summer 18, 19), **Regulation of Public Enterprises** (Lecture, Master FU, Winter 14/15), **Wealth and Income Distribution in the Long-run** (Seminar, Master FU, Summer 15), **Wealth and Income Distribution in Germany** (Seminar, Master FU, Summer 14), **Regulation of Public Enterprises** (Tutorial, Master FU, Winter 12/13), **Globalization and the Welfare State** (Tutorial, Bachelor FU, Summer 12, 13), **Macroeconomics** (Tutorial, Bachelor FU, Summer 10, 11), **Introduction to Macroeconomics** (Tutorial, Bachelor FU, Winter 09/10, 10/11, 11/12)

## STUDENT SUPERVISION

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02/2024 PhD dissertation committee of Theresa Neef at the Freie Universitaet Berlin  
11/2020 PhD dissertation committee of Diego Collado at the University of Antwerpen  
09/2019-08/2021 Distributional National Accounts (DINA) for Germany (N. Murken; L. Maaßen)  
10/2015-current Constructing an EU-SILC-clone-panel with German SOEP (H. Nachtigall, F. Deckstein)  
06/2016-02/2018 Automatic Stabilizers in Europe (T. Neef)  
06/2009-current Supervision of 10 bachelor and 12 master theses in Public Economics

## KNOWLEDGE TRANSFER

- 3. Katholische Armutskonferenz, Caritas München (01/24)
- Deutscher Gewerkschaftsbund (DGB) housing policy conference (04/23)
- „The world of tomorrow. Inequality and participation – challenges of today’s economic policy“, podium discussion with Thomas Piketty, Nikolaus Wolf and Cornelia Woll at Hertie School (11/2022)
- Heppenheimer Tage christlicher Gesellschaftsethik (02/2020): „Wohneigentum und Ungleichheit“
- Europäische Akademie Berlin (03/2019): “Unkept promises? Social market economy meets reality”
- IG Metall (12/2018): „Einkommensverteilung in Deutschland, 1871-2014“, Frankfurt a.M.
- Arbeiterkammer Wien (05/2018): „Einkommensverteilung in Deutschland, 1871-2013“, Austria
- Landeszentrale für politische Bildung Baden-Württemberg (02/2018): „Geschichte der Ungleichheit in Deutschland und der Welt“, Bad Urach, Germany
- 10. Bayreuther Dialoge (10/2013): “Freiheit, Sicherheit, Versicherung”, Bayreuth, Germany

## ACADEMIC ADMINISTRATION

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Member of the faculty council at FU (2011-2012); Member of the department council at FU (2012-2013)

## LANGUAGES

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German (native), English (advanced), Portuguese (advanced), French (intermediate)  
Stata, Python, R, Latex

Munich, 5 February 2024