

Dr. Charlotte Bartels

Institute for Public Finance und Public Management
Universität Leipzig
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Augustusplatz 10
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Married, two children (07/2016, 10/2019)

Curriculum Vitae

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POSITIONS

04/2025 –	W3 Professorship for Public Economics, University of Leipzig
10/2024 – 03/2025	Interim W3 Professorship for Public Economics, University of Leipzig
10/2023 – 03/2024	Interim W3 Professorship (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 – 09/2024	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

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

RESEARCH VISITS

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

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

2018	Travel grant for a research visit at University of California, Berkeley, <i>Fritz Thyssen Foundation</i>
2015	<i>Roman Herzog Award</i> 2015 for Social Market Economy Research
2015	<i>Wolfgang-Ritter-Award</i> 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

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, *Journal of Income Distribution*
 01/2013 – 07/2015 Coordinator, PhD program “Public Economics and Inequality”, *Freie Universitaet Berlin*

PUBLICATIONS

A. ARTICLES IN REFEREED JOURNALS

Wealth and its distribution in Germany, 1895-2021 (with T. Albers and M. Schularick),
 accepted at **Journal of the European Economic Association**.

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.

Wealth creator or inheritor? Unpacking the gender wealth gap from bottom to top and young to old (with E. Sierminska and C. Schröder), **Economics Letters** 246 (2025): 111997.

Long-term effects of equal sharing: Evidence from inheritance rules for land (with S. Jäger and N. Obergruber),
Economic Journal 134(664) (2024): 3137–3172.

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

The distribution of national income in Germany, 1992-2019

(with S. Bach and T. Neef), <http://dx.doi.org/10.2139/ssrn.4487665>. (R&R at **European Economic Review**)

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

(with J. König and C. Schröder), https://papers.ssrn.com/sol3/papers.cfm?abstract_id=4892823

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

Die Einkommens- und Vermögensverteilung in Deutschland (with T. Neef), **Wirtschaftsdienst** 7, 2024, 441–447.

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

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 and A. Diegmann)

PRESENTATIONS

INVITED TALKS

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|------|---|
| 2025 | DICE Research Seminar, Heinrich-Heine-University of Düsseldorf (scheduled)
Keynote at 14 th Dresden Workshop on Labor Economics and Social Policy (scheduled)
Dresdener Vorträge zur Wirtschaftspolitik (scheduled)
Research Seminar, OsloMet (scheduled)
ReStart Talk, University of Cologne (scheduled) |
| 2024 | Keynote at the inauguration of the Stone Center for Wealth Inequality at LMU Munich
Bundesbank Research Seminar, Frankfurt
EconTribute Seminar, University of Cologne
Research Seminar in Sociology, LMU
Messung von Vermögen in Deutschland, BMWK
Inequality in Rome seminar, University Roma Tre |
| 2023 | Keynote on "Growth and the 'sociale Frage'", Jahrestagung Verein für Socialpolitik
Economics and Sustainability Research Seminar, University of Regensburg
ECARES Seminar, Université libre de Bruxelles
Economic Research Seminar, University of Magdeburg
Research Seminar, Max Planck Institute for the Study of Societies
Ludwig Erhard ifo Research Seminar
Economic Research Seminar, University of Bayreuth
Economic History Seminar, University of Pennsylvania
Economic History Seminar, Columbia University |
| 2022 | Research Seminar in Public Economics, LMU Munich
Research Seminar in Economics, University of Tübingen
Research on Europe, Center for European Studies, Harvard University
Economic History Workshop, Harvard University |

	Institute for International Economic Policy, George Washington University Public Finance/Labor Workshop, Harvard University Workshop "Socioeconomics of housing and finance", JFKI, Freie Universitaet Berlin
2021	ifo Center for the Economics of Education Seminar Seminar for Social and Economic History, Goethe University of Frankfurt Economic History Seminar, University of Münster Economic History Seminar, University of Mannheim Lecture series Inequality, John-F.-Kennedy Institute, Freie Universitaet Berlin Research Seminar in Economics, University of Hohenheim Economic History Seminar, New York University (NYU) Research Seminar, Potsdam Institute for Climate Impact Research (PIK)
2020	Economic History, Growth & Development Seminar, University Halle Determinants of Wealth Inequality Workshop, University St. Gallen Economic History Seminar, Universidad Carlos III de Madrid Online Workshop on Wealth Taxation, University of Düsseldorf European Macro History Online Seminar <i>Economic History Seminar, Paris School of Economics (cancelled because of pandemic)</i> <i>Advanced Research Collaborative, City University New York (cancelled because of pandemic)</i> <i>Lecture series on Polarization, University of Bonn (cancelled because of pandemic)</i>
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 <i>Work, wages and income distribution</i> , 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 <i>Work, wages and income distribution</i> , University of Göttingen
2015	UCFS Public Economics Seminar, Uppsala University Research Department Seminar, Statistics Norway Workshop on Measuring Inequalities of Income and Wealth (<i>organized by OECD, Bertelsmann Stiftung and High Level Expert Group on the Measurement of Economic Performance and Social Progress</i>)
	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 th Household Finance Workshop; Verein für Socialpolitik, 77 th Congress of the International Institute of Public Finance (IIPF)
2021	2 nd World Inequality Conference; NBER Summer Meeting; Verein für Socialpolitik, 77 th Congress of the International Institute of Public Finance (IIPF); 20 th Louis-André Gérard-Varet (LAGV) public economics conference; 7 th Meeting of the ECINEQ Society; Household Finance Conference at Deutsche Bundesbank
2020	Verein für Socialpolitik, 76 th 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 th Meeting of the ECINEQ Society, Paris, France; Workshop for Women in Macroeconomics, Finance, and Economic History, Berlin
2018	LIS user conference, Luxemburg; 74 th 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 th Meeting of the ECINEQ Society, New York, USA
2016	11 th Winterschool on Inequality and Social Welfare Theory, Canazei, Italy
2015	71 th Congress of the International Institute of Public Finance (IIPF), Dublin, Ireland; 6 th Meeting of the ECINEQ Society, Luxembourg
2014	70 th Congress of the International Institute of Public Finance (IIPF); Lugano, Italy; 4 th SEEK Conference, ZEW, Mannheim, Germany; Conference on Crises and the Distribution, Berlin, Germany; 13 th Finanzwissenschaftlicher Workshop, Berlin
2013	69 th Congress of the International Institute of Public Finance (IIPF), Taormina, Italy; 5 th Meeting of the ECINEQ Society, Bari, Italy
2012	Jahrestagung des Vereins für Socialpolitik, Göttingen, Germany; 11 th 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 th Congress of the International Institute of Public Finance (IIPF), Ann Arbor, USA; 4 th Meeting of the Society for the Study of Economic Inequality (ECINEQ), Catania, Italy; 8 th FDZ-Rentenversicherung Workshop, Kiel, Germany
2010	66 th Congress of the International Institute of Public Finance (IIPF), Uppsala
2009	3 rd Meeting of the Society for the Study of Economic Inequality (ECINEQ), Buenos Aires, Argentina

REFEREEING

B.E. Journal of Economic Analysis and Policy, Economic Journal, Economic Policy, Economics Letters, European Economic Review, 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

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)

COMMITTEES, JURYS AND STUDENT SUPERVISION

04/2024	Jury member for the Helga-Marrel-Award 2024 (50.000 Euro) of the Adolf-Christ-Foundation
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

- 17. Klett Symposium Geographie/Politik/Wirtschaft "Globale Herausforderung: Ungleichheit erfassen und entgegenwirken (03/25)
- Keynote WSI Herbstforum (11/24)
- 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

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

LANGUAGES

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

Leipzig, 28 March 2025