

Clarifications Tender SHARE Wave 10

2022-2023



SHARE IS THE LARGEST PAN-EUROPEAN SOCIAL SCIENCE PANEL STUDY.

SINCE 2004 MORE THAN 140.000 PEOPLE PARTICIPATED IN 380.000 INTERVIEWS.

How we age in Europe.



SHARE
SURVEY OF HEALTH, AGEING
AND RETIREMENT IN EUROPE

SHARE PROVIDES MICRO DATA ON HEALTH, SOCIO-ECONOMIC STATUS AND SOCIAL & FAMILY NETWORKS.

**Survey of Health, Ageing and Retirement in Europe -
European Research Infrastructure Consortium
(SHARE-ERIC)**

Table of Contents

1	CLARIFICATIONS FOR PROCUREMENT GROUP I	3
---	----------------------------------------------	---

The following document comprises clarifications to all questions posed to SHARE-ERIC concerning the tender for SHARE Wave 10 in the following countries:

PROCUREMENT GROUP I

Bulgaria

Cyprus

Croatia

Lithuania

Romania

Slovakia

1 CLARIFICATIONS FOR PROCUREMENT GROUP I

COUNTRIES: BULGARIA, CYPRUS, CROATIA, LITHUANIA, ROMANIA, SLOVAKIA

- **Regarding REFRESHMENT SAMPLE**

Should the specified number of respondents given in the price file be evenly distributed throughout the country, or will we receive instructions from you regarding the specific geographical regions where the survey should be conducted?

The aim of the SHARE survey design is to be able to draw proper inferences about the population of people who are 50 years and older across countries by using probability-based sampling. This might involve a (random) selection of primary sampling units (PSU) that need, however, to be evenly distributed across the country. What is important here is that such multi-stage sampling designs must allow the calculation of inclusion probabilities or the likelihood to be sampled for every unit in the sample.

- **Regarding DROP-OFF**

Who is responsible for printing the questionnaire? If we will be responsible, we need to know the quantity of pages as this will affect the shipping cost.

As laid out in section 7.4 of the Task Order for Drop-Off, survey agency shall print out a sufficient amount of hard copies of the drop-off and all necessary instructions how to use it during fieldwork. The proposed drop-off in Lithuania comprises approximately 8 pages (including cover and instruction page). Please note that a drop-off will only be conducted under the condition that the relevant funding will be available, which is not the case yet.

- **Regarding DROP-OFF**

Is further control of the questionnaire planned? If so, who is responsible for it?

All of the survey agencies responsibilities concerning the data collection and data handling of the drop-off are laid out in section 7 of the respective task order.

- **Regarding DROP-OFF**

Who will be responsible for sending the questionnaire, we or the University?

Survey agency will be responsible for printing the questionnaire and handing it out to the respondents after the interview.

As laid out in section 20.2 (6) of the Data Collection Framework Contract, the drop-off shall be handed out to the respondent by the interviewer after the regular CAPI interview. Should face-to-face mode not be possible, according to section 7.3 of the Task Order for the Paper and Pencil Questionnaire (Drop-Off), survey agency may send the drop-offs to respondents via mail. For completed drop-offs, interviewers may wait and collect the completed drop-offs from the respondent directly after the interview, or allow respondents to send the completed drop-offs via mail to the survey agency. For data delivery to SHARE Coordination, survey agency shall read in and deliver the data in electronic format, as laid out in section 7.7 of the Task Order for Drop-Off.

- **Regarding DROP-OFF**
Whether the questionnaire data entry into the database will be necessary?

Survey agency shall read in and deliver the drop-off questionnaire data in electronic format (preferably Stata, SPSS or EXCEL) to SHARE Coordination, according to section 7.7 of the Task Order for Drop-Off and the deliverables FiRe_DO_data and Main_DO_data (see Table 1. Drop-off deliverables of SURVEY AGENCY, Wave 10) of the respective task order.

- **Regarding DROP-OFF**
Will the completed questionnaires need to be sent abroad or only within the country?

Sending of completed questionnaires abroad will not be necessary:

As laid out in section 20.2 (6) of the Data Collection Framework Contract, the drop-off shall be handed out to the respondent by the interviewer after the regular CAPI interview. Should face-to-face mode not be possible, according to section 7.3 of the Task Order for the Paper and Pencil Questionnaire (Drop-Off), survey agency may send the drop-offs to respondents via mail (within the country). For completed drop-offs, interviewers may wait and collect the completed drop-offs from the respondent directly after the interview, or allow respondents to send the completed drop-offs via mail to the survey agency (within the country). For data delivery to SHARE Coordination, survey agency shall read in and deliver the data in electronic format, as laid out in section 7.7 of the Task Order for Drop-Off. Therefore, no sending of completed questionnaires via mail abroad is necessary, given that the survey agency is located in the same country as the respondents.

- **Regarding DROP-OFF**
Is there an additional payment for completing the questionnaire?

Concerning payments to the survey agency:

Payments for the drop-off sample will be made as laid out in section 4 of the Task Order for the Paper and Pencil Questionnaire (Drop-Off). Actual payments consist of the fixed costs and the variable payments, where every complete and valid drop-off questionnaire that can be matched to a complete and valid main interview, will be paid a unit price, according to the selected offer.

Concerning payments to the respondent:

Respondents usually do not get any additional incentives for completion of the drop-off.

- **In the form 6_Price_Specification_Form_Refreshment_BG, there is requirement for offering: Sampling. Can you clarify whether the sampling design and specifications for the sample as well as the purchase of the sample with specific sampling units for Bulgaria should be included in this budget line?**

Yes. Please include costs for sampling design (according to section 6.2 of the Task Order for Main Data Collection) as well as costs for the purchase of the sample.

- **Based on your experience from the first wave for Bulgaria (SHARE wave 7) what is the response rate for participation for the first time in the panel among eligible households respectfully the response rate among eligible individuals?**

The actual response rate of the baseline sample in Bulgaria in Wave 7 lay between 56% (RR1) and 62% (RR3).

- **About REFRESHMENT SAMPLE: Is there a difference in survey length in REFRESHMENT SAMPLE interviews compared to CAPI? Is there screening procedure for eligibility of the households after the gross sample is drawn? If yes, in which budget line should we include it?**

On average, there are only small differences between refreshment and panel interview (usually, panel interviews are slightly shorter, but other factors like first or second respondent of a couple are more important).

Yes, interviewers shall manage contacts with households and assess household eligibility as well as composition (for both refreshment and panel interviews) in the coverscreen as part of the contact respondent procedures via the Case CTRL (see section 20.2 (2) of the Data Collection Framework contract).

- **According to the Data Collection Framework Contract for the SHARE Wave 10 Survey, page 16:
(6) Refreshment Sample: Eligibility Rules in Case of a Sample Frame of Individuals and
(7) Refreshment Sample: Eligibility Rules in Case of a Sample Frame of Households there is requirement that “Only the randomly selected respondent plus his/her partner (independent of age) will be interviewed.”
Would partners’ interviews be included in the calculation of effective refreshment interviews?**

Yes. Interviews with partners will be included in the calculation of actual refreshment interviews, as long as these interviews are complete and valid.

- **In section 20.2 General Terms and Abbreviations there is definition of (6) The drop-off questionnaire and (7) Drop-Off Multi-Mode Experiment. Do you envisage implementation of these instruments in Bulgaria?
If yes, where should we include them in the budget?**

No, these projects are not planned for Bulgaria.

Section 20.2 of the Data Collection Framework Contract contains all terms and abbreviations used in SHARE, including those that are not necessarily applicable in every country. If no Task Order for drop-off / no Task Order for drop-off multi-mode experiment is included in your tender documents, these projects are not planned for your country.

- **Is there requirement that all interviewers’ trainings should be in-person?**

Yes, interviewer trainings should be held in person. Should it be the case that external factors (e.g. pandemic situation) make in-person training impossible and after approval from SHARE Coordination, trainings may be held virtually.

- **There is no budget line for travel expenses for field rehearsal. Can you confirm if field rehearsal for wave 10 will be face to face? If yes, where should we include travel expenses in the budget?**

Yes, field rehearsal for SHARE Wave 10 will be face-to-face, as is should be conducted in such a manner that all procedures and resulting data will closely resemble the main data collection. Please include these costs in Item FiRe_05 (Data collection).

- **Could we use tablets instead of laptops?**

Yes, our software does run on tablets that are based on a Windows System but it does not run on tablets based on iOS or Android, yet. Please see section 9 and section 20.1 of the Data Collection Framework Contract for the technical requirements.

- **Could we use database of respondents who have already participated?**

Yes. The SHARE panel database consist of respondents that participated in a previous wave of the SHARE data collection (plus their partners). The information on households and respondents will be uploaded in the SHARE SampleCTR. Households are assigned to interviewer laptops where the SHARE CaseCTRL is installed, that indicates who in a household is eligible for an interview.

- **Do you have an expected number of interviewers who should participate in the survey?**

There is no specific number of interviewers set as a requirement. However, survey agency needs to make sure that the number of interviewers hired and trained for SHARE will be sufficient to complete all fieldwork activities in time (see section 10.1 of the Data Collection Framework Contract), while the maximum number of conducted interviews per interviewer shall not exceed 50 interviews (see section 7.1 of the Task Order for Main Data Collection). Possible interviewer drop out shall also be considered.

- **Can you give us more details about what strata will cover the refreshment sample? We assume that some big cities had a lower response rate, respectively retention rate, and you/ the Country Coordinator want to focus on these cities. It is very important how we have to design the refreshment sample. Should it be nationally representative for +50 y.o.? Should it cover only some localities or areas/ strata (big urban, medium urban, only rural...)? The cost is impacted by these details. For small urban and rural localities we have to consider a higher payment for the interviewers than in big cities, for example.**

Refreshment samples in SHARE should not mix up the sampling process with the response process in terms of regional variation. Such variation regarding response/retention should be taken care of during the contact phase and with the provided weights. Our main argument against such oversampling based on regional differences in response/retention (incl. higher incentives for certain areas) is that this might very likely lead to "more of the same", but does not help much when it comes to representativeness.

Therefore, the main aim of the sampling design is to be able to draw proper inferences about the population of people who are 50 years and older in a certain country by using probability-based sampling. This might involve a (random) selection of primary sampling units (PSU) that need, however, to be evenly distributed across the country. What is important here is that such multi-stage sampling designs must allow the calculation of inclusion probabilities or the likelihood to be sampled for every unit in the sample.

What could be considered is variation in response/retention based on age, including an oversample of the youngest missing cohorts. The idea here is to adapt the SHARE sample in a way that it reflects the current age distribution of the 50+ population (e.g. based on margins from Eurostat).