

## Clarifications Tender SHARE Wave 11



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)**

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The following document comprises clarifications of all questions posed to SHARE-ERIC concerning the tender for SHARE Wave 11 in the following countries:

### **PROCUREMENT GROUP I**

*Germany*

*Croatia*

*Hungary*

*Italy*

*Lithuania*

*Latvia*

*Slovenia*

# 1 CLARIFICATIONS FOR PROCUREMENT GROUP I

COUNTRIES: GERMANY, CROATIA, HUNGARY, ITALY, LITHUANIA, LATVIA, SLOVENIA

- **Regarding FiRe in Italy**

- **Can you please inform about the size of the preload?**

Estimated number of eligibles in FiRe panel sample: 185

Due to this high number of FiRe panel cases, we would suggest draw about 50 additional refreshment households to realize roughly 70 panel and 30 refreshment interviews.

- **How many cases of refresher must be included in the net sample of the preload?**

**We assumed a proportion of 70 (panel)-30 (refresher)%. Could you confirm that?**

The database management team is currently working on the preload to derive the number of panel cases. The number of refreshment cases is linked to that number. However, a proportion of 30% refreshment cases seems to be a realistic assumption.

- **Is the Drop off questionnaire included in the FiRe?**

Yes, the drop-off must be included in the field rehearsal.

According to 7.1 of the Task Order for Drop-off, SURVEY AGENCY shall test the drop-off during the field rehearsal. A drop-off will only be approved for the main data collection, if it has been tested. In case SURVEY AGENCY cannot comply with this requirement, SHARE-Coordination may allow deviating proceedings after individual assessment together with CTL and SURVEY AGENCY.

- **Is the linkage module included in the FiRe?**

Yes, the linkage module is included in the FiRe for preloaded countries. For IT, it will be included.

- **The TTT for IT personnel is to be considered in presence or not?**

It will be remote both for FiRe and Main.

- **Drop-off and Linkage module should be submitted to the Refresher sample as well?**

Linkage will be administered to the refreshment sample as well. Drop-off will only be conducted for the panel sample.

- **Regarding Main Data Collection in Italy**

- **Can you please inform about the size of the preload? According to the requested Net sample and the target of RR we assumed that:**

- **The total gross sample will be composed by 5006 eligible individuals of which:**

- 1182 coming from W10 refreshment
- 3824 coming from W10 panel sample (excluding exit interviews and code 217)

- **According to these figures, we would conduct:**

- 3516 panel interviews with people participating in W10
- 218 panel interviews with people NOT participating in W10

Yes, your numbers are pretty much in line with what we assume. However, the data is still being processed, and the final numbers will slightly deviate from the mentioned numbers.

- **The TTT for IT personnel is to be considered in presence or not?**

It will be remote both for FiRe and Main.

- **Drop-off and Linkage module should be submitted to the Refresher sample as well?**

In case a refreshment sample will be issued (which is dependent on the relevant funding being available), linkage will be administered to the refreshment sample as well. Drop-off will only be conducted for the panel sample.

- **How long is the duration of the NTS?**

The NTS should be conducted strictly following the instructions from the TTT in terms of content, length and mode, which according to the Model Contract (section 20) is two full days.

- **How many pages are planned for: recording booklets and for the showcards?**

Recording booklets: 7 pages

Set of showcards: 48-55 pages

Both are to be printed on A4 format and one-sided only.

- **Regarding Drop-Off in Italy**

- **Can you confirm the drop-off questionnaire must be programmed by the agency?**

Yes, SURVEY AGENCY will be responsible for programming the interview software for the drop-off questionnaire, testing it out and providing their interviewers with necessary instructions how to use it during fieldwork in coordination with the CT. SURVEY AGENCY needs to make sure that the programmed software fits the format requirements, defined matching variables are included and the data exports are in SHARE standard to be further processed.

- **The drop-off questionnaire must be submitted to all individuals or one per HH?**

If a drop-off is conducted, all interview eligible SHARE respondents are also eligible to complete a drop-off if they participate in a regular CAPI interview. Thus, the standard is that the drop-off should be handed out to every SHARE respondent.

- **Could you inform about the length of the drop-off questionnaire?**

The standard length for drop-off is a maximum of 6–7 pages and not more than 10 minutes administration time.

- **The requested number of drop-off questionnaires (3361) include the FiRe cases?**

No, the requested number of drop-offs is taking into account only the target net sample size of panel and refreshment cases.

- **In SHARE W11 we intend to work with a contractor for setting up and hosting the SHARE survey tool. Please let us know if this has an impact on which parts of the document „Checklist: "Technical and organisational measures" we should fill in or how to refer to the contractor/if we should obtain all the info from them? In the TOMs review for W10 e.g. a large part of the questionnaire was considered superfluous after the switch to this contractor. (The reason we are asking this now is because in W10 we**

switched to our contractor after the completion of FiRe, so last time we did not have the contractor in our bid and therefore we are unsure how to proceed). The contractor we intend to work with is an independent non-profit research institute involved in several large-scale multinational research projects (including SHARE) who also offer hosting services to national agencies in these projects.

For SHARE Wave 11, the installation and configuration of the necessary software on the server side is carried out centrally by Centerdata on a dedicated host for SHARE. For this reason, SHARE-ERIC has commissioned Centerdata to set up a central SHARE environment (SbyC). Therefore, there is no need that for the Survey Agency to commission a contractor for this purpose.

Within its sphere of responsibility, the Survey Agency is obliged to take technical and organisational measures for the adequate protection of the processed personal data that must meet the requirements of the GDPR (Article 32). These measures must be documented in Appendix 1 of the "Data Processing Agreement" (DPA). The document "Checklist: 'Technical and Organisational Measures'" provides guidance on documenting the measures that are in place to guarantee the security of data processing. Only if data processing clearly falls within the sphere of responsibility of SHARE-ERIC or Centerdata (e.g., in the case of the SbyC), a reference to this in the Survey Agency's documentation is sufficient and the documentation of the respective measures is carried out by SHARE-ERIC or Centerdata.

- **We would like to use laptops or mixed devices – I can see in the Model contract that „Laptops (with Windows operating system) may only be used for the data collection in justified exceptional cases and with prior written approval from SHARE-ERIC.” – please let us know when this can be justified in your view and what extra information we should include in our bid to support our request.**

**There is a plan to use tablets for wave 11. However, if we still have functioning laptops from wave 10, could we continue to use them, or will tablets be mandatory in all cases for wave 11?**

Indeed, the standard for Wave 11 will be tablets, however if tablets would have to be purchased while functioning laptops are available, this would be a justification for the use of laptops – provided they are meeting the necessary technical requirements. Kindly indicate in your offer which client devices you plan on using.

- **As the last procurement took place 4 years ago, we would like to increase the size of incentives for respondents. I would like to confirm whether we can increase the incentives at our own discretion, and you will review their appropriateness only after the procurement documents have been submitted, or if we need to agree on this in advance?**

As the Model Contract does not stipulate a fixed amount for incentives, kindly include an amount at your discretion in your offer. SHARE-ERIC will not enter bilateral discussions with any tenderer before offers are submitted.

Important: Please provide reasoning for your suggestion in your tender, explaining how you intend to set up incentives for Wave 11.

- **According to the documents, the main fieldwork should start in spring 2027. Are there at least approximate dates for the FiRe as well?**

The TTT for Field Rehearsal is planned to take place end of September 2026. We expect fieldwork to take place October – November.