

Clarifications Tender SHARE Wave 11



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**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	PROOCUREMENT GRUP II	PROOCUREMENT GRUP III	PROOCUREMENT GRUP IV
<i>Germany</i>	<i>Bulgaria</i>	<i>Cyprus</i>	<i>Austria</i>
<i>Croatia</i>	<i>Finland</i>	<i>Czech Republic</i>	<i>Estonia</i>
<i>Hungary</i>	<i>Greece</i>	<i>Spain</i>	<i>Poland</i>
<i>Italy</i>	<i>Latvia</i>	<i>Slovakia</i>	<i>France</i>
<i>Lithuania</i>	<i>Malta</i>		
<i>Latvia</i>	<i>The Netherlands</i>		
<i>Slovenia</i>	<i>Portugal</i>		
	<i>Romania</i>		

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.

2 CLARIFICATIONS FOR PROCUREMENT GROUP II

COUNTRIES: BULGARIA, FINLAND, GREECE, MALTA, THE NETHERLANDS, PORTUGAL, ROMANIA

- **Could you please confirm whether interviews can be conducted offline in CaseCTRL and synchronized afterwards?**
Yes, this will work.
- **To be sure: the NTS takes as long as the TTT, so two full days? (“The NTS should be conducted strictly following the instructions from the TTT in terms of content, length and mode.”).**
Yes, the NTS should be conducted in the same mode and length and with the same content as the TTT.
- **Regarding Refreshment Sample in The Netherlands:**
Could you please clarify the practical and financial arrangements for obtaining the refreshment sample? The sample is probably obtained from CBS. Who will be responsible for placing the order, and who will bear the associated costs?
The refreshment sample will be provided, and the associated costs will be covered by the Country Team.
- **To be sure: Could you please confirm whether the absence of a separate unit price for end-of-Life Interviews means that the Survey Agency is to conduct these interviews without additional compensation? “End of Life Interview (XT Module) The end-of-life interview is a special form of proxy interview (see (18)). In case an age-eligible panel respondent deceased, a proxy will be asked to complete a short, separate interview. An end-of-life interview focuses on events that occurred between the respondent’s last interview and the time of his/her death. The end-of-life interview can be done face to face or by phone. It can be started via the Case CTRL and be done immediately after the coverscreen, after the - 13 - interview or postponed to a later appointment. There is no separate unit price for end-of-life interviews.”**
Complete and valid end of live interviews will be counted as complete and valid interviews and compensated with the unit price for panel sample interviews.
- **Question: the 61%/30% mentioned in 13.4 of the Framework contract is after refusal conversion?**
These percentages refer to the final achieved retention/ response rates after fieldwork has ended. The purpose of this section is to ensure that public funding is not being spent on data without scientific use because of improper performance of a contractor. If all agreed upon measures to increase retention have been taken and the final result still falls short despite proper performance, this section will not apply, and the sample will be paid as defined in the task orders.
- **In the Netherlands, all tenderers are expected to offer for both panel and refreshment sample. Everything in the model contract is to be considered a description of the tasks to be performed by the selected Survey Agency, including section 6.2 of the main task**

order (given the relevant funding will be available). Price specification forms for both panel and refreshment sample contain fixed costs. However, some fixed costs only need to be made once (or can be priced more efficient) if the Survey Agency executes both panel and refreshment (for example, we only need to train interviewers once). How does this work in specifying costs, if fielding a refreshment sample is not a certainty yet?

Indeed, pricing can be optimised if full information of the available funding is available. Unfortunately, this is not always the case, which is why, as a standardised procedure, SHARE-ERIC always procures under the caveat that relevant funding will be available. In case of The Netherlands however, we can let you know that funding to conduct a refreshment sample has been secured.

- **As of Wave 11, the SHARE survey will be administered on tablets rather than laptops. Are there any other IT-related changes compared to Wave 10? If so, can you specify them?**

- SampleCTRL is now connected to a new tool called PreloadCTRL, which is why SbyC hosting is required in wave 11. But as you already used SbyC this wouldn't make a difference for the setup in NL. Administration of PreloadCTRL is fully on the SHARE Central team.
- Via PreloadCTRL SHARE Central can now directly push delete requests to SampleCTRL which should reduce communication necessary.
- Survey agency will be enabled to enter delete requests directly via the SampleCTRL systems, so CaseCTRL only has to be synced.

- **Are there any changes regarding the installation and functioning of CaseCTRL and SampleCTRL compared to Wave 10 that Survey Agency should take into account? If so, can you specify them?**

- CaseCTRL is now designed to be used on tablets.
- CaseCTRL is set up to work both in online and offline mode.
- As in Wave 10, the system syncs when logging into CaseCTRL. In addition, it now automatically syncs after every action that modifies data. Manual syncs are still possible.
- The questionnaire software that is used for the Main interview is now programmed in quest, which is the same as End-of-life interview in wave 10. We will adapt the training accordingly. Still, we tried to keep it as similar to wave 10 as possible.
- The overall usability of the CaseCTRL has been improved.

- **What is the prescribed or desired financial value per respondent for the incentive, and do you expect this to be in the form of cash or gift vouchers? Or is this at the discretion of Survey Agency?**

The type and the value of incentives should be discussed and agreed on with the Country Team.

- **Would SHARE-ERIC be willing to make a current ISO 27001 or NEN 7510 certification mandatory, in order to guarantee a consistently high level of information security for all providers?**

There are currently no plans to introduce mandatory certification; however, it is necessary to implement technical and organisational measures for adequate protection of personal data in order to ensure a level of security appropriate to the risk for the rights and freedoms of the data subjects. These must be documented in Appendix 1 to the Data Processing Agreement. If relevant certifications are held, these may also be included there.

- **Which objective benchmark or standard does SHARE-ERIC use to assess 'fair compensation' for awarding the 16% score?**

In order to be awarded the full score, a detailed description of interviewer compensation is expected, demonstrating that interviewers are being compensated in such a manner that ensures high motivation, and incentives to reach the highest possible retention rate. This includes e.g. appropriate salaries and compensation for expenses as well as incentives for good performance.

- **Checklist: Does SHARE-ERIC apply a minimum cryptographic norm or standard (such as TLS 1.2+ for transport and AES-256 for storage) that the infrastructure and data transfers are required to meet?**

While the specific technical scope of this question would benefit from further definition, we can confirm that SHARE-ERIC mandates that all cryptographic protocols for infrastructure, data storage, and transfer strictly adhere to the current state of the art and established industry best practices.

- **Is SHARE-ERIC willing to apply an equal (to 'Main Data Collection') advance payment scheme for the 'Field Rehearsal' (for example, 40% at the start) to cover the initial investments in startup and hardware?**

The payment modalities as laid out in the task orders are harmonised across all SHARE countries and therefore not subject to individual adjustments.

- **How long does the specific IT staff training last (in hours or days), and is it conducted digitally or on-site?**

The IT training will be remote and last 1-2 hours.

- **Is an interview considered incomplete (and therefore unpaid) if the respondent refuses to complete a specific module halfway through the interview for personal reasons?**

No. Item-nonresponse does not make an interview incomplete. An interview is considered incomplete if entire modules are missing; i.e. the interview has not fully been conducted with the respondent and thus cannot be used for the released dataset.

- **Would you be willing to increase or lift the fixed limit of a maximum of 50 interviews per interviewer, provided we can demonstrate that data quality is strictly ensured through additional checks?**

If it can be convincingly demonstrated that data quality is ensured or there are very specific and well laid out reasons for assigning more interviews to certain interviewers, we are open to considering these options on a bilateral basis during fieldwork. However, the tenderer shall demonstrate that the interviewer pool is large enough to handle the project, irrespective of how experienced the interviewers might be.

- **If prepaid incentives are sent to the gross sample, should these costs be quoted as fixed costs (FC) or as variable costs (VC)?**

As laid out in the price file, respondent incentives will be attributed to variable costs.

- **Could you specify the exact requirements or certifications a tablet must meet to be considered "professional"?**

All client devices used for SHARE Wave11 must comply with the technical requirements as laid out in section 20.1 of the Framework Contract. "Professional" refers to client devices provided by the tenderer for the explicit purpose of carrying out the interviewer work. No private client devices must be used.

- **Is SHARE-ERIC willing to move the submission deadline of the 'FiRe_AdvanceLetter' and 'FiRe_DPS' to the period after the completion of the TTT, so that tactical insights can still be incorporated into the letters?**

No. Both the Advance Letter and the DPS must be submitted before the FiRe TTT, exactly as specified in the task order. The purpose of the Field Rehearsal is to conduct a test run. "Tactical insights" from the FiRe may still be incorporated in the Advance Letter for the main data collection, provided that it is resubmitted and approved. The DPS is standardised across all SHARE countries and shall only be translated but not be modified.

- **Can you indicate whether the costs for returning the borrowed equipment will be borne by the contractor or by the contracting authority?**

The shipment costs will be borne by SHARE ERIC.

- **What is the methodological or budgetary reason for the significant difference (between Panel and Refreshment) in the maximum allowed fixed costs (25% versus 33%)?**

A higher share of fixed costs is expected in the setup of conducting a refreshment sample and reaching the target response rate, compared to the well-established panel.

- **In what way can the implementing agency concretely demonstrate that it has taken 'all reasonable measures' in the event of a response below 30%, and does this evidence then guarantee full payment for work performed?**

Survey Agency is expected to demonstrate compliance with all contractual obligations (e.g. proof of requested number of contact attempts). In addition, Survey Agency is expected to consult with SHARE Coordination about measures to improve retention during fieldwork if it becomes apparent that these rates may turn out lower than expected. Communication and cooperation with SHARE Central and the SHARE Country Team will be considered. In such case, yes, survey agency will be paid for the work performed. The purpose of this section is merely safeguarding public funds in case of improper performance or noncompliance attributable to a contractor.

- **I understand that responses regarding the technical and organizational measures should be completed in the file <2_Appendix1>. I also noticed that the PDF document covers largely the same topics and questions. Could you please clarify the intended purpose of the <2a_Checklist> file and whether any additional action is required on our side regarding this document?**

The Checklist is simply meant as a supporting document for your convenience to fill out Appendix1. No need to adjust or submit this file.

- **I understand from the pricing request included in the tender package that a quotation for a refreshment sample is required, as was the case in the W10 tender. Apart from the target sample size, I could not identify any methodological specifications regarding the refreshment sample. Therefore, at this stage, the only feasible assumption for budgeting purposes is a nationally representative refreshment sample. This may result in relatively high fieldwork costs, as these are directly influenced by the distribution of interviews across locality-size strata (with approximately 70% in rural areas and small towns). We would therefore appreciate confirmation that a nationally representative refreshment sample (population aged +50) should be assumed for the purpose of this tender.**

Yes; the general specification is laid down in Section 6.2 of the task order for main data collection (esp. that a "probability refreshment sample will be conducted with selected sample

units"). However, the concrete sampling frame and design will be developed together via the completed sampling design form (SDF). In this respect, please see the Sampling Guide, which contains all relevant information on drawing a refreshment sample: https://share-eric.eu/fileadmin/user_upload/SHARE_Working_Paper/SHARE_WP_87-2023.pdf

- **When should the data collection (fieldwork period) be carried out?**

FiRe: Oct-Nov 2026

Main: March-August 2027

- **Regarding Sampling in Finland:**

The call for tender specifies the target number of interviews for the different components (panel sample and refreshment sample). What are the gross sample sizes for these components?

The net expected number of interviews refers to gross sample sizes according to the following specifications:

- 85% retention rate in the panel sample
- 40% response rate, 1.5 eligibles per household, and ~5% buffer for invalid addresses in the refreshment sample; further, we stipulate random reserve batches in case fieldwork performance is worse than expected.

- **Regarding Refreshment Sample in Finland:**

What are the requirements regarding the regional coverage of the refreshment sample? Should all sampled units be contacted in accordance with the minimum contact attempt requirements and with geographically balanced coverage, or is it acceptable to exclude some cases (e.g. due to long travel distances) and instead achieve the target number of completed interviews by drawing additional sample units?

In principle, all sampled units need to be contacted in accordance with the minimum contact attempt requirements and with geographically balanced coverage according to the sampling design form we agree on. However, in Finland, we made an exception for Åland islands in the past due to long travel distances.

- **Should the drop-off questionnaire be completed only by those respondents who participated in the interview?**

Yes, SHARE-ERIC will only approve drop-off data that can be matched to a complete main interview.

- **Is the drop-off questionnaire handed to respondents at the end of the face-to-face interview, or are they also sent by post to respondents?**

The drop-off questionnaire is a separate paper and pencil questionnaire for self-completion to be handed out to the respondent by the interviewer after the regular CAPI interview. Sending out drop-offs per post of drop-off is not intended. The drop-off is left with the respondent to be *sent back* via postal service to the Survey agency.

- **How many postal mailings per sampled unit are included in total (i.e., all letters and materials combined)?**

- Respondents chosen in the sample are mailed a cover letter
- Interviewed respondents are mailed a gift voucher
- Reminders are sent electronically (in this case no mailed letters are needed)
- Interviewer or interviewee mails Finnish country team consents forms for register-linkages and drop off questionnaires (if in paper). There can be several schedules in one return envelope if the interviewer mails them. Return envelopes have been paid by the Finnish country team in earlier waves.

- **In which languages will the survey be conducted in Finland? Who is responsible for translating the questionnaire?**

In Finland the questionnaire is administered in Finnish and Swedish. The translations for the questionnaires (both in Finnish and Swedish) are provided by the Finish country team

- **Is the use of the centrally provided questionnaire and systems (SampleCTRL, CaseCTRL) mandatory? In which languages are these available?**

Finnish and Swedish are provided in Finland.

- **Is the validation (back-checking) conducted by telephone and by the data collection organisation? What is the typical duration of the validation interview?**

See 12.2 of main task order: Verification involves calling the selected respondents by telephone or visiting them face-to-face if telephone contacts are unsuccessful and re-asking factual questions from various parts of the interview according to SHARE deliverable Main_BackCheck. Back-checks should be short: about 10 questions.

- **Is it possible to omit some questions in the questionnaire and instead use corresponding information from national register data?**

No, that is not an option.

- **What are the “tests” following the interview questions in practice? How many are there, and do they require any special expertise from the interviewers?**

1. Cognitive tests

The SHARE cognitive module assesses several domains of cognitive functioning that are relevant for studying cognitive ageing, cognitive decline, and dementia. It includes the following tests:

Cognitive Domain	Test	Purpose
Orientation	Giving the Date	Assesses orientation in time.
Episodic Memory	Immediate and Delayed Word Recall	Measures the ability to learn and remember information over a short period.
Verbal Fluency / Executive Function	Animal Naming Task	Assesses word retrieval, verbal fluency, and executive functioning by asking respondents to name as many animals as possible within one minute.
Attention & Processing Speed	Serial 7 Subtraction	Measures concentration, attention, and mental processing speed through repeated subtraction of seven from 100.
Attention & Processing Speed	Counting Backwards from 20	Assesses attention and processing speed using a timed backward counting task.
Semantic Memory	Word Knowledge Test (65+)	Measures semantic memory and retrieval of common words and concepts.
Visuospatial Abilities	Drawing Tasks (Infinity Loop, 3D Cube, Clock Drawing)	Assesses visuospatial skills, constructional abilities, and aspects of executive functioning.

2. Grip strength measurements using dynamometers (equipment).

None of the cognitive tests require interviewers to have specialist clinical knowledge or prior expertise in cognitive assessment. Regularly trained interviewers with experience in

standardized survey interviewing are fully capable of administering the tests. The SHARE survey software and interviewer materials guide interviewers step-by-step through each test, including the administration procedures and scoring rules. SHARE Central provides comprehensive training materials and detailed instructions to the Survey Agencies, which subsequently train interviewers on the administration and scoring of all cognitive tests. This standardized approach ensures consistent implementation and high data quality across countries.

- **What equipment is required for the “tests”, and is the data collection organisation responsible for procuring these?**

Dynamometers will be provided by SHARE-ERIC.

- **Our interviewers currently use laptops. Are tablets required for conducting the interviews? If so, is the procurement of these devices the responsibility of the data collection organisation?**

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.

- **Does the interviewer complete the questionnaire during the interview, or is the device handed over to the respondent to fill in themselves?**

The interviewer will type the answers into the client device.

- **Could you kindly clarify what is meant by the selection criterion: Number of requested changes to harmonised model contract**

The tender will be awarded the full score if acceptance of the harmonised model contract is explicitly confirmed. If deviations to some of the procedures and/ or requirements are suggested or part of the submitted offer, this score will consequently be reduced.

3 CLARIFICATIONS FOR PROCUREMENT GROUP III

COUNTRIES: CYPRUS, CZECH REPUBLIC, SPAIN, SLOVAKIA

- **Refreshment sample: Will a refreshment sample be conducted in Slovakia as part of Wave 11?**

Yes, a refreshment sample is planned for Slovakia, which is why it is part of the model contract and price files. However, this is dependent on the costs for the planned refreshment sample and the availability of funding, obtained to cover refreshment samples in multiple countries. Therefore a definite answer cannot be given at this point in time.

- **If a refreshment sample is planned for Slovakia: Is there a prescribed methodology / operational approach for implementing the refreshment sample (sampling frame, batching, fieldwork procedures), or should the survey agency propose the methodology as part of the tender?**

Yes, there is a prescribed methodology in SHARE. Please find the Sampling Guide online: https://share-eric.eu/fileadmin/user_upload/SHARE_Working_Paper/SHARE_WP_87-2023.pdf with sampling aspects that should be applied in Wave 11, too. Any remaining questions can, of course, be discussed on a bilateral basis. The Sampling Design Form

(SDF) filled in by the agency after procurement serves as a discussion basis for the actual implementation.

- **Tablet-based CAPI: Can the SHARE tablet software be installed remotely on interviewers' tablets, given that tablets are geographically distributed across the country, or is a central, in-person installation on all devices required?**

The tablet doesn't need to be in the main office for the installation. We will provide installation guidelines including some recommended settings and it would be good if a local supervisor could get familiar with it and make sure the tablet is set up correctly.

- **National Training Sessions (NTS): In which mode should NTS be delivered (in-person / face-to-face vs. remote/online)? Additionally, do you confirm that NTS are required after both the Field Rehearsal TTT and the Main Data Collection TTT (i.e., separate NTS cycles for each survey stage)?**

The NTS should be conducted in the same mode (in-person) as the TTT. A NTS is required after both, the Field Rehearsal TTT and the Main Data Collection TTT.

- **Could you please confirm the required net sample size for SHARE Wave 11 in Slovakia, separately for the panel sample, refreshment sample and field rehearsal? We understand from the documentation that the expected net sample is 802 panel interviews, 700 refreshment interviews if applicable, and 100 field rehearsal interviews. Could you please confirm that this interpretation is correct?**

Correct. The expected net sample for the panel sample is 802. The expected net sample for the refreshment sample is 700. The expected net sample for the field rehearsal in mono-lingual countries is 100.

- **What is the current size and structure of the Slovak SHARE panel that would be made available to the successful contractor for fieldwork purposes, in terms of number of households and number of respondents?**

Based on former SHARE waves we expect the number of net expected interviews to correspond to approx. 652 households. Presumably 88% of these households participated in the last wave, while 12% did not. It is important to note that the number for the net expected panel sample (Nexp) is based on preliminary numbers available by the time of procurement.

- **Who is currently the formal owner/controller of the Slovak SHARE panel contact database, and how would access to the necessary contact information be granted to the successful contractor?**

SHARE-ERIC is the owner of the survey and all of its data. Access will be granted through SHARE-ERIC via the SbyC.

- **Will the successful contractor be granted access via SbyC to all contact information necessary for fieldwork, including telephone numbers, email addresses, reference contacts, contact history and relevant interviewer comments?**

Yes, despite contact history and interviewer notes.

- **Will historical paradata and contact outcomes from previous waves be made available to the successful contractor, including previous contact attempts, refusal history, preferred contact times, mover/tracking information and case-specific notes?**

Internal data such as notes ect. will not be provided to the new contractor, but information about previous refusals will be provided in preload database and these persons will be marked in the instrument.

- **How will the transition of respondents from the current survey agency to a new survey agency be organised, should a new contractor be selected? In particular, will SHARE-ERIC or the Country Team support the introduction of the new contractor to respondents?**

There is no "transition protocol" in place with regards to new interviewers/ new survey agencies.

- **Will respondents be informed in advance about a potential change of survey agency, and who will be responsible for this communication?**

No, such communication is not foreseen.

- **Has SHARE-ERIC previously experienced changes of survey agencies in other countries? If yes, what impact did such transitions have on retention rates, respondent cooperation and fieldwork costs?**

There have been some but not many agency changes in SHARE. The retention drops somewhat definitely, but it depends on the country and the circumstances. More information can be gathered from the technical paper when looking at retention after an agency change.

- **What retention rates were achieved in Slovakia in Wave 10 and Wave 9, separately for households/respondents who participated in the previous wave and those who did not participate in the previous wave?**

For Wave 9, the final rates (for different definitions) are provided in the technical paper: https://share-eric.eu/fileadmin/user_upload/SHARE_Working_Paper/SHARE_WP_104-2025.pdf.

Retention in Wave 10 is about 85% for respondents/households.

- **Could you please provide the most recent available breakdown of Slovak panel cases by final outcome category, for example completed interview, refusal, non-contact, moved, deceased, ineligible and other outcomes?**

Since data cleaning is still ongoing, we cannot provide such a breakdown of final outcome categories right now, survey agencies will receive more information on the panel sample from SHARE Central before fieldwork.

- **If the required number of interviews cannot be achieved from the existing panel sample despite all reasonable contact and conversion efforts, how should this be handled? Is any additional recruitment or substitution of respondents permitted, and if so, under what conditions and limits?**

There won't be additional recruitment with regards to the panel sample.

- **How many interviewers and supervisors were involved in the Slovak Wave 10 fieldwork, and what was the average and maximum number of completed interviews per interviewer?**

The relevant information in this regard is that SHARE-ERIC requires a sufficient number of interviewers and that the maximum number of interviews per interviewer acceptable to SHARE-ERIC is 50.

- **What proportion of respondents in Wave 10 were interviewed by the same interviewer as in the previous wave?**

We strongly encourage survey agencies to employ as many interviewers as possible who worked on previous SHARE and that interviewers keep their assigned households across waves whenever possible.

- **Based on previous SHARE experience, what impact does a change of interviewer typically have on respondent cooperation and retention?**

A change in interviewers is expected to be associated with a decrease in respondent cooperation and retention. As this depends on the country and the circumstances, exact numbers are not available.

- **Are there any arrangements, restrictions or recommendations regarding continuity of interviewers from previous waves in Slovakia, especially in the event of a change of survey agency?**

If possible, interviewers should be employed with previous SHARE-experience and keep their previous households. If no prior SHARE-experience is available, SURVEY AGENCY shall make sure that all interviewers employed to work on the SHARE project possess extensive interviewing experience and have received in-person general interview training from SURVEY AGENCY.

- **Are there any minimum requirements or expectations regarding:**

- number of active interviewers,
- regional interviewer coverage,
- supervisor-to-interviewer ratio,
- maximum interviewer workload,

for the Slovak implementation?

All minimum requirements are laid out in the SHARE-ERIC model contract.

- **Could you please provide the expected regional distribution of the Slovak panel households/respondents, and if available, the expected regional distribution of the refreshment sample? This would help estimate interviewer coverage, travel costs and fieldwork feasibility.**

Survey agencies will receive more information on the panel sample from SHARE Central before fieldwork. For the refreshment sample, it should be representative sample of the 50+ population in SK.

- **Are there any restrictions on when interviews may be conducted, for example only within specific hours such as 9:00–20:00?**

Respondent contract attempts shall comply with Section 9 of the task order for main data collection.

- **Are there any required or expected proportions of interviews or contact attempts to be conducted on weekdays, weekday evenings and weekends, beyond the minimum contact attempt schedule specified in the documentation?**

No, there are no such required proportions.

- **Can you please confirm whether the refreshment sample will definitely be implemented in Slovakia in Wave 11? The tender documentation frequently refers to the refreshment sample as “if applicable”, while the pricing template includes an expected net sample of 700 interviews.**

While a refreshment sample is planned for Slovakia, its implementation is dependent on the costs for the planned refreshment sample and the availability of funding, obtained to cover refreshment samples in multiple countries. Therefore, a definite answer cannot be given at this point in time.

- **What sampling frame is expected to be used for the Slovak refreshment sample?**

Preferably, it should be a sample drawn from a register with individual information on age etc. (see sampling guide). However, in the last refreshment sample this was not possible in SK.

- **Who is responsible for obtaining access to the sampling frame and for any associated costs?**

Costs for obtaining the sampling frame should be reflected in the price sheet.

- **What gross sample size is expected to be required in order to achieve the target of 700 completed refreshment interviews?**

Calculations are based on the target response rate of 40%.

- **What response rates were achieved for the refreshment sample in the most recent Slovak SHARE wave(s)?**

For Wave 9, the final rates (for different definitions) are provided in the technical paper: https://share-eric.eu/fileadmin/user_upload/SHARE_Working_Paper/SHARE_WP_104-2025.pdf.

- **Will the refreshment sample be drawn as a household/address sample or as an individual sample, and are there any country-specific assumptions already available for Slovakia?**

Preferably, it should be a sample drawn from a register with individual information on age etc. (see sampling guide).

- **Could you please clarify the expected scope of the respondent helpline mentioned in the documentation? In particular, should it cover telephone only, or also email communication?**

Phone is mandatory, but also email would be appreciated.

- **What service hours are expected for the respondent helpline? Is availability expected during evenings, weekends or public holidays?**

There are no specific regulations. Service times should be in line with what may reasonably be expected by respondents.

- **Are there any expected response-time requirements or service-level expectations for the respondent helpline?**

There are no specific regulations. Response times should be in line with what may reasonably be expected by respondents.

- **What was the historical volume of respondent contacts handled through the respondent helpline during the previous Slovak wave, if available?**

Not available.

- **How many respondents are currently included in the Slovak panel care programme?**

In general, all respondents in the panel sample are included in the panel care, there might be a few that refused to be contacted, they will be tagged in the panel preload which will be provided to the agency before fieldwork. After fieldwork all respondents from the refreshment sample (if applicable) will also be included in the panel care, if they conducted an interview in wave 11.

- **Could you please provide indicative historical volumes for:**
 - **panel care brochures,**

- seasonal greeting cards,
- reply cards,
- thank-you letters,
- advance letters,
- other respondent mailings?

These figures would help estimate the required panel maintenance effort and associated costs.

Derived from Slovak wave 10 panel sample data, estimations are the following:

- panel care brochures: 701
- seasonal greeting cards: 1113
- reply cards: 35
- thank-you letters: 966
- advance letters: 1123

- **Which physical measurements will be conducted in Slovakia as part of Wave 11?**

In wave 11, grip strength will be measured.

- **Apart from dynamometers, will any additional measurement devices be used? If yes, which ones?**

No additional devices will be used.

- **Will all measurement equipment be provided by SHARE-ERIC, or is the survey agency expected to supply any equipment?**

Equipment will be provided by SHARE-ERIC (see framework contract section 8).

- **Will SHARE-ERIC provide detailed instructions for storage, handling, calibration, maintenance and return of the physical measurement equipment?**

Yes. These instructions will be part of the TTT.

- **Does SHARE-ERIC provide recommended or preferred solutions for Mobile Device Management, VPN configuration and Mobile Threat Defence software for interviewer tablets?**

There are no specific recommendations. We don't provide software solutions that go beyond what's mentioned in the model contract.

- **Are there any preferred or previously tested tablet models, brands or technical configurations that SHARE-ERIC recommends for SHARE data collection?**

We have no specific brand/ models to recommend but some guidelines:

Technical Requirements

Operating Systems & Devices

Allowed devices

- Windows PC / Laptop
- Android Tablet

Not allowed

- iOS devices (iPhone, iPad)
- Android phones
- macOS or Linux computers

Android Tablet – Minimum Requirements

(The Android tablet must meet all of the following requirements)

- Android version: 14 or higher required from 2026
 - RAM: At least 2 GB
 - Processor: CPU 1.6 GHz or higher
 - Screen size: 10 inches or larger
 - Tablets smaller than 10 inches are not supported
 - Storage encryption (usually standard in current android tablets):
 - Must be supported
 - Must be enabled
-
- **Will SHARE-ERIC provide a detailed technical configuration guide or acceptance checklist for interviewer tablets, including MDM, VPN, encryption, password policy, browser settings and Mobile Threat Defence requirements?**
 In addition to the details laid out in the model contract, e.g. point III Client device, we will provide some guidance on settings during the TTT in September/October.
 - **Will a technical or information-security audit of interviewer devices be conducted before fieldwork starts?**
 No audit is planned to take place before the fieldwork, however the survey agency needs to comply with all regulations as laid out in the model contract and data processing agreement.
 - **Are there any additional technical requirements or certification procedures for interviewer tablets beyond those specified in the tender documentation?**
 There is nothing else known at the moment.
 - **Is any part of the interview, respondent interaction or physical measurement procedure expected to be audio-recorded or otherwise recorded? If yes, where should such recordings be stored, who would have access to them, and who would be responsible for reviewing them?**
 No audio or video recordings will take place.
 - **Could you please clarify how the minimum 10% back-checking requirement per interviewer should be operationalised in practice? For example, should the back-checks be conducted continuously during fieldwork or mainly after completion of interviews?**
 Back-checks should be completed within due time of receiving the templates from SHARE Central, preferably until the next data synchronisation. This is to make sure that respondents can still recall the interview enough to answer the verification questions.
 - **Will SHARE-ERIC provide the sample of interviews selected for verification, or is the survey agency expected to select the cases according to SHARE rules?**
 See Main Task Order section 12: SURVEY AGENCY shall certify that a minimum of 10% of each interviewer's complete interviews are verified by supervisory personnel. Interviews are selected randomly by SHARE Coordination and are provided together with the interviewer's unique identification number to SURVEY AGENCY (Main_BackCheck, Table 1).
 - **What was the historical level of back-checking effort in Slovakia in previous waves, including the number of cases requiring additional verification or follow-up?**
 The regular back-checking procedures have been followed.
 - **In case of suspected interviewer falsification or low-quality data, what is the expected procedure, timeline and responsibility split between SHARE-ERIC, the Country Team and the survey agency?**

Within all households with completed interviews SHARE Central checks for flags for suspicious interview(er)s, based on interview times, lengths and response patterns. The respondent IDs of the suspicious interviews are gathered in an Excel-file, along with verification questions, which is made available to the agencies. The verification needs to be done by the agency and documented in the Excel file provided and returned to SHARE, preferably until the following data synchronisation. Lists with new interviews to be back-checked will be prepared about 2-4 times during fieldwork.

- **Could you please provide the actual number of completed panel interviews, refreshment interviews and participating households achieved in Slovakia in Wave 10?**

Since data cleaning is still ongoing, we cannot provide such a breakdown of final outcome categories right now, survey agencies will receive more information on the panel sample from SHARE Central before fieldwork.

- **Are there any country-specific deliverables, procedures or expectations for Slovakia that are not explicitly described in the standard tender documentation?**

All expected deliverables are listed in the model contract.

- **Are there any known changes in Wave 11 compared with previous Slovak SHARE waves that may materially affect fieldwork duration, interviewer workload, respondent burden or project costs?**

Survey agency will use the SbyC.

- **Could you please confirm whether the successful contractor will receive any historical operational documentation from previous Slovak waves, such as interviewer instructions, respondent communication materials, panel care templates or country-specific fieldwork procedures?**

In cooperation with the country team, we will provide current information for wave 11 including interviewer instructions, contact addresses, templates for fieldwork material.

- **Are there any specific expectations regarding cooperation with the Slovak Country Team during fieldwork, for example frequency of meetings, escalation procedures or involvement in respondent communication?**

Close cooperation with the country team will be required. No specific meeting schedule is foreseen, however more information on the collaboration with the country team will be made available by the time of the TTT.

4 CLARIFICATIONS FOR PROCUREMENT GROUP IV

COUNTRIES: AUSTRIA, ESTONIA, POLAND

- **The Price Specification Forms for our country distinguishes between scenario 1 and 2 with different sample sizes. As there is no further description of these scenarios in the other documents, we would like to ask for specifics. In case the smaller sample in scenario 2 is meant to include or exclude specific groups or implement some kind of disproportionality, we would need more details, in order to adjust the calculations accordingly.**

Kindly disregard the mentioning of refreshment in the price file for the panel sample. In fact, there will not be a refreshment sample for Austria in wave 11. The scenarios refer to the full

panel sample (scenario 1) and a reduced panel sample (scenario 2), which will become relevant only in case funding does not cover the fielding of the entire panel sample. Scenario 2 will be a stratified random sample of the full panel sample; no groups will be excluded from the smaller sample.

- **As there are several relevant technical changes in W11 compared to W10 (e.g. quest, SbyC), we would like to know, who is testing the new tools and when? Can we assume that everything is tested and working faultlessly, or do we need to include testing in the calculation of FiRe? If so, how does this influence the timeline of FiRe?**

Yes, there are a lot of technical changes in the wave 11 software. We will teach them at the TTT. SHARE Central and Country Teams will take care of the testing and provide a software that is at the best stage possible at that point of time. FiRe is meant for testing the software and procedures, no additional software testing should be planned by the agency.

- **In the Model Contract, Chapter 12.1 it says that the SHARE Country Team will be responsible for panel care (and not the Survey Agency, as in earlier waves). This fits to the fact that there is no longer a row for panel care in the Price Specification Form for the panel sample. However, in the Invitation to Tender chapter 3.1 the tenderer is urged to include a description of “procedures to implement panel care [...]”. Is it correct to assume, that our tender does NOT have to include such a description?**

Yes, this is correct. You do not need to include any description regarding panel care for wave 11 in Austria.

- **Is it acceptable for the field rehearsal sample in Poland to be based on a quota sample of eligible respondents, rather than a (PESEL) register-based sample, given the timing constraints specific to the rehearsal phase?**

Yes.

- **If a quota sample is acceptable, are there any minimum requirements regarding quota structure (e.g., age bands, gender, region/urbanicity) to ensure the rehearsal sample is representative enough for its diagnostic purpose?**

In contrast to the main data collection, you are not obliged to draw a full probability sample for the FiRe. Instead, we advise you to draw a stratified random sample based on gender, age groups (e.g. 50-64, 65-79, 80+), working status, and language if you have to provide the questionnaire in different languages.

- **With reference to the refreshment sample for the 50–59 age group, clarification is requested regarding the expected response rate: Is a differentiated response rate anticipated for individual age groups, or a single aggregated rate for the entire sample? What minimum response rate for the 50–59 age group is required?**

For the refreshment sample in wave 11, we have a single aggregated target response rate of 40%, which should be reached.

As there is no bonus-/malus-system in place, no minimum response rate is required, provided all reasonable measures to achieve the target have been taken; note that section 13.4 of the data collection framework contract holds for both scenarios, whereby SHARE-ERIC reserves the right to withhold payment for an entire refreshment sample, if the individual response rate falls below 30% and SURVEY AGENCY fails to demonstrate to SHARE-ERIC that all reasonable measures to achieve this response rate have been taken (e.g. high contact rates and sufficient contact attempts).

- **In the Interviewer Description Document for SHARE Wave 10, one of the sections concerns interviewers' employment status/experience, distinguishing between Staff or**

in-house interviewers (number/share), and Freelance or contracted interviewers (number/share). Could you clarify how these two categories should be understood — i.e., what is the definition of each?

With staff or in-house interviewers, we are referring to employees who are permanently employed with your company or salaried. Freelance or contracted interviewers are those who are independent (freelance/ self-employed) and contracted with your company only with regards to a specific project.

- **In France: what is the breakdown of panel households that responded in W10, by those with 1 person and those with 2 persons ?**

About 40/60.

- **In France: what is the breakdown of panel households that did not respond in W10, by those with 1 person and those with 2 persons ?**

About 35/65.

- **What is the geographical breakdown of panel households in France, by department or municipality?**

In France, the sample is drawn by the French National Institute of Statistics and Economic Studies (INSEE) based on housing and individual demographic files (Fidéli). For Wave 10 we had the following specifications: The sample was restricted to individuals whose primary residence is in mainland France excluding Corsica. The sampling frame to be used is the most recent version of the FIDELI file (administrative tax data register) at the time of the drawing (in Wave 10, this was 2023). The refreshment of the main SHARE sample for Wave 10 was carried out by a two-stage draw. The first stage of the draw involved selecting 200 primary sampling units (PSUs) from the FIDELI sampling frame among the 5,036 PSUs covering mainland France excluding Corsica. By definition, these primary units were groupings of neighbouring municipalities.

The selection of PSUs in the first stage was carried out using a spatially balanced draw stratified by the former administrative region (NUTS2), systematically including the 45 PSUs corresponding to the districts of Paris, Lyon, and Marseille (i.e., 155 + 45 PUs). In addition to this spatial balancing, a “socio-demographic” balancing of the PSUs draw was applied based on the following variables: a) Five-year age groups and gender; b) Decile of residents’ income level: from the 1st decile to the 10th decile; c) Type of housing distinguishing between apartments and houses; d) housing tenure status, distinguishing between owner-occupiers and tenants; e) Type of household structure, distinguishing four types of households (individual alone, couple alone without co-residents, individual alone with other co-resident, couple with other co-resident). The total number of individuals to be drawn in the refreshment sample was determined by three aspects: i) The target number of individual interviews conducted; ii) Different sets of assumptions about the participation level of longitudinal individuals in Wave 10 based on their age and participation history; iii) Assumptions about the participation level observed in the refreshment sample.

- **What is the method used to compile the refresh file in France: is there a FIDELI-type database provided by the CTL, and if so, what is its size for the Main region? Are there any reserve files?**

See answer given above. In addition, the aim is to interview 1,100 new respondents in Wave 11. To achieve this number in Wave 10, we had 2,628 individuals in the first random batch and 2 additional reserve batches of 1250 individuals each. However, the response was lower than expected and we ended with roughly 1000 interviews. For this number, one of the

reserve batches was fielded. In Wave 11 we plan to decrease the size of the reserve batches and increase the size of the main batch.

- **What is the proportion of households in France with and without a landline/mobile in the panel?**

In the first SHARE Corona Survey (2020), 14% of the panel households did not have a valid phone number. However, this number should be lower now.

- **In Model Contract 20.2 (8), the estimated duration of a single interview is between 70 and 85 minutes whereas in Table 7.7 of the SHARE_Methodenband_WEB_Wave9 's appendix, the mean is below 68 minutes. Is this due to the online rather than face-to-face data collection method?**

The table in the Methodology Volume is based on keystrokes and excludes the coverscreen. There is a difference between measuring the duration of the items and the actual interview length as mentioned in the Model Contract.

- **Can we have the duration figures for one-person households and for two-person households?**

We provide only the estimated median duration of the individual face-to-face interview across all countries participating in the last wave and across all first and second interviews within a household. This duration excludes contacting of households and eligible persons, logging of contact data, and assessing the household composition (so-called "coverscreen"). The interview length of a single interview is estimated to take between 70 and 85 minutes. No country-specific adaptation to this overall estimate will be permissible.

- **What is the amount of the incentive to which Panel respondents agreed in W10, and can the amounts be changed despite this commitment?**

In the previous wave, the incentive was €15 for a single respondent and €20 for a couple. However, these amounts seem low given the current inflation rate, and survey agencies should address this in their proposals. The Country Team also wishes to make the survey agency aware that having both members of the household respond is very important, and that the €5 differential should be reconsidered.

- **Are the addresses in the refresh file for France in the same area as those in the panel?**

This is something we have to decide together with the CT. In principle, INSEE is able to re-use the 200 PSUs used for Wave 10, but a careful assessment of the current regional distribution in the panel sample should be done first before a decision is made.

- **What is geographical area of FiRe in France?**

The geographical area of FiRe is defined by two conditions:

- Follow-up of panel respondents who have previously participated in FiRe
- Sampling of refreshment respondents (in contrast to the main data collection, you are not obliged to draw a full probability sample for the FiRe. Instead, we advise you to draw a stratified random sample based on gender, age groups (e.g. 50-64, 65-79, 80+), and working status.)

Based on these two criteria, FiRe is only conducted in 3 departments in France:

- Indre-et-Loire (37)
- Meurthe-et-Moselle (54)
- Moselle (57)

- **In its favourable opinion on the French SHARE survey, issued on 29 September 2022, the CNIS Official Statistics Quality Label Committee raised concerns about the low expected response rate among first-time respondents and the associated risk of nonresponse bias. (cf <https://www.cnis.fr/app/uploads/2024/07/ae-2024-leda-share-bisannuelle.pdf>)**

If needed, SHARE Coordination may prepare and provide an internal report, containing detailed information on the data collection and interview process.

- **Is there any evidence indicating whether the Wave 10 refreshment response rate was affected by the use of telephone contact prior to face to face or allow number of contact attempts?**

There is some evidence that advance contact increases response rates, which is why a letter is sent prior to the interview. There is also evidence from Sweden suggesting that phone contact before the face-to-face interview may further improve response rates. However, phone contact is not always feasible, as we do not have phone numbers for a large proportion of the refreshment sample — and in any case, an unanswered phone call does not preclude a face-to-face contact attempt. Furthermore, according to the methodological literature, initial face-to-face contact is recommended, as refusal rates tend to be higher over the phone.

Finally, the model contract provides a clear framework for contact attempts:

“Initial contact with the selected sample person shall be made in-person, unless otherwise agreed upon with SHARE Coordination.” (9.2.1)

“Before a household can be considered a final non-contact, a minimum of six contact attempts according to the following contact schedule is required:

- Weekday daytime: at least 2 contact attempts
- Weekday evening: at least 2 contact attempts
- Weekend: at least 2 contact attempts' (9.2.3)”

- **For Wave 11, is initial telephone contact authorised or recommended for refreshment-sample households when a telephone number is available, particularly to limit unnecessary interviewer travel?**

See answer above. We need valid phone numbers for the refreshment cases. Currently, we would stick with the literature and suggest initial face-to-face contacts.

The main objective of the first phone contact is ONLY to schedule an appointment. The survey agency may attempt to arrange this by phone first; however, in the event of no answer or a refusal, a face-to-face visit is required and mandatory. An unanswered phone call does not constitute a contact attempt, and a phone refusal should not be treated as a definitive refusal — interviewers are expected to follow up with a face-to-face contact regardless.

- **When respondents originally entered the French SHARE panel, were they informed of a defined duration for their participation or of a planned final wave, for example Wave 10?**

No, there was never a mentioning of any defined duration or final wave. The SHARE project has no end date. We do not know when the project will come to an end.

- **If Wave 11 extends respondents' participation beyond the duration originally presented to them, should renewed information, renewed consent, specific communication measures or an additional incentive be planned and a lower retention rate expected?**

See answer above. Respondents are being informed by an advance letter regarding the upcoming study and consent needs to be given prior to the interview.

- **The protocol mentions the administration of physical and mental health tests. Does the stated average interview duration of 70 to 85 minutes include these tests?**

Yes, these tests are included.

- **How many physical tests and cognitive tests are planned per respondent?**

1. Cognitive tests

The SHARE cognitive module assesses several domains of cognitive functioning that are relevant for studying cognitive ageing, cognitive decline, and dementia. It includes the following tests:

Cognitive Domain	Test	Purpose
Orientation	Giving the Date	Assesses orientation in time.
Episodic Memory	Immediate and Delayed Word Recall	Measures the ability to learn and remember information over a short period.
Verbal Fluency / Executive Function	Animal Naming Task	Assesses word retrieval, verbal fluency, and executive functioning by asking respondents to name as many animals as possible within one minute.
Attention & Processing Speed	Serial 7 Subtraction	Measures concentration, attention, and mental processing speed through repeated subtraction of seven from 100.
Attention & Processing Speed	Counting Backwards from 20	Assesses attention and processing speed using a timed backward counting task.
Semantic Memory	Word Knowledge Test (65+)	Measures semantic memory and retrieval of common words and concepts.
Visuospatial Abilities	Drawing Tasks (Infinity Loop, 3D Cube, Clock Drawing)	Assesses visuospatial skills, constructional abilities, and aspects of executive functioning.

None of the cognitive tests require interviewers to have specialist clinical knowledge or prior expertise in cognitive assessment. Regularly trained interviewers with experience in standardized survey interviewing are fully capable of administering the tests. The SHARE survey software and interviewer materials guide interviewers step-by-step through each test, including the administration procedures and scoring rules. SHARE Central provides comprehensive training materials and detailed instructions to the Survey Agencies, which subsequently train interviewers on the administration and scoring of all cognitive tests. This standardized approach ensures consistent implementation and high data quality across countries.

2. Grip strength measurements (two measurements on each side) using dynamometers (equipment which will be provided by SHARE-ERIC).

- **Is there a detailed list of the measurements, assessments, or exercises to be administered?**

See answer above.

- Are they conducted with all respondents or only with specific respondent groups?**

In general physical or cognitive tests shall be conducted with all respondents who are willing to participate. However for some specific test or questions the routing also depends on previous answers, or the ability to do the test, e.g. if someone is hemiplegic, the grip strenght test can of course only be done with the other hand.
- Could you specify the equipment provided to interviewers for conducting the physical measurements?**

Smedley S Dynamometer manufactured by TTM in Tokyo dynamometers are used for the grip-strength measuremt. They will be provided by SHARE-ERIC.
- What is the approximate weight of the physical measurement equipment that interviewers are required to transport?**

The device weighs approximately 490g.
- Are logistical details available regarding transportation and storage (e.g., volume, packaging, delivery process)? How does the Survey Agency receive the equipment?**

The dimensions of the dynamometer boxes are 23.5 × 16.5 × 6.5 cm (L × W × H). Equipment will be shipped.
- For interviewer training, should we anticipate two or three training days?**

Two days should be anticipated.
- Can we assume that the training effort required for the Field Rehearsal (pilot phase) is similar to that required for the Main Data Collection, or are additional training sessions typically needed?**

It should be 2 days of training for NTS both for FiRe and Main fieldwork. As for FiRe there are less interviewers in field than for Main, usually countries plan several NTS sessions for Main to keep the interviewer group size manageable and efficient.
- What volume of translation work is expected from the Survey Agency? Which documents require translation by the agency, and which are already translated by the Country Team?**

Translation is handled entirely by the CT. The questionnaire, showcards, and interviewer documents, etc. are currently being translated and tested. No translation work is performed by the survey agency.
- Does the local Country Team validate all fieldwork materials (DPS, information letters, interviewer materials, etc.), or only specific documents?**

The CT and survey agency work together to validate all fieldwork material before the national training session. The survey agency is responsible for printing the necessary documents (recording booklets, drop-offs, etc.) and sending the advance letter before fieldwork begins, but the templates are created by the CT and validated in collaboration with the agency.

- **What volume of addresses is provided for the Field Rehearsal (pre-test)?**
 - Estimated number of eligibles in FiRe panel sample: 173
 - Suggested size of FiRe refreshment sample (households) that should be drawn in addition: 50

Usually, we assume a retention rate of 50% in the FiRe panel sample (including hhs which have/have not participated in the previous wave). For the FiRe refreshment sample, we assume a response rate of 30% and an interview ratio per household of 1.5 net interviews.

- **The contract specifies a target of 100 completed interviews for the Field Rehearsal but does not indicate the number of addresses available to achieve this target. Can you confirm the composition of this pre-test sample? What proportion comes from the longitudinal panel? What volume of refreshment sample is planned within the pre-test? Who is responsible for identifying and providing addresses for the refreshment component?**

See above.

The agency is responsible for identifying and providing addresses for the refreshment component. Ideally, you would draw the FiRe refreshment sample in the same manner as the sample for the main data collection to mimic the whole sampling procedure properly. However, in contrast to the main data collection, you are not obliged to draw a full probability sample for the FiRe. Instead, we advise you to draw a stratified random sample based on gender, age groups (e.g. 50-64, 65-79, 80+), working status, and language if you have to provide the questionnaire in different languages. You are allowed to choose one of the following alternatives:

- Full probability sample
 - Probability sample including only a subset of regions
 - Unused batch(es) from a previous wave
 - Access/proprietary panel
- **What is the quality of the contact information provided for the longitudinal panel?**

For the longitudinal panel, the contact information provided to the survey agency consists of data collected during the previous wave (street address, and possibly one or two phone numbers and an email address). This contact information may have been updated since the last wave by respondents who communicated changes — either spontaneously, following panel care actions, or upon receiving the advance letter. Errors or wrong information can happen, for information, approximately 0.3% of panel respondents in Wave 10 had moved abroad, and 0.5% had an incorrect phone number.
 - **Regarding the longitudinal panel sample: Are the supplied addresses considered up to date and pre-qualified? When were they last updated? What quality control procedures have been conducted beforehand?**

The addresses used are those from the respondent's most recent wave of participation. They may have been updated since then following panel care actions or when the advance letter (which can be completed by an email in case we have an email address) is sent out prior to fieldwork. Panel care is the main way to keep information up to date.

- **Regarding the longitudinal panel sample: What level of contact detail is available?**

- Postal address only?
- Telephone number(s)?
- Email address(es)?

Postal addresses are always provided. Phone numbers and email addresses are included if the respondent has previously provided them (as asked in the CAPI before starting the interview). Contact details for a proxy (family member, friend, or neighbour) may also be available if the respondent has previously supplied them.

- **Regarding the longitudinal panel sample: Although the initial contact must be made face-to-face, do interviewers have access to telephone contact details to facilitate appointment scheduling and respondent follow-up?**

Phone numbers are available only if the respondent provided one during a previous participation or when receiving the New Year's greeting card, or when receiving the advance letter. Providing a phone number is not mandatory: respondents choose whether or not to share it.

- **Retention Rate and Mortality Management: When calculating the target retention rate of 85%, how are respondents who have died between survey waves treated?**

Died respondents are subject to conduct an End-of-Life interview with a proxy (partner, close relative etc.) unless data cleaning rules are applied. Sample cleaning rules in SHARE:

- Households in which none of the eligible members has participated in three or more consecutive waves are dropped from the longitudinal sample. Non-participation can be either non-contact, refusal, unknown address or any other justified reason.
- Eligible individual sample members who have deceased and where it was not possible to find a proxy conducting an end-of-life interview for two waves or longer are dropped from the longitudinal sample.

- **Are exceptional events that may affect mortality within the target population, such as a heatwave, excluded from the retention rate calculation, or are they still included in the performance indicators applied to the Survey Agency?**

See above.

- **How are interviews conducted in nursing homes, retirement homes, or other institutions for older adults managed?**

A presentation (from Wave 10, might be slightly revised for Wave 11), including all relevant details is attached at the end of this document. We can provide you with a generic template of a gatekeeper letter.

- **Are institutionalized respondents included in the agency's retention and productivity targets?**

As long as they are eligible for SHARE, yes (see reasons in the attached presentation).

- **Which party is responsible for obtaining access authorizations from institutions?**

The Agency is responsible for obtaining access authorization.

- **Are specific procedures in place regarding consent from vulnerable individuals?**

SHARE has procedures and guidelines to obtain consent from individuals that apply to all potential respondents.

- **Are there specific guidelines when a proxy respondent or legal representative is involved?**

There are specific guidelines on when and how to involve proxies, e.g. we do not conduct proxy interviews if respondents are not willing to participate

- **Refreshment Sample (Target: 1,100 Interviews): Can you confirm that identifying and providing addresses is the responsibility of the Survey Agency? If so, which sampling sources are accepted by SHARE?**

The refreshment sample is drawn by INSEE. The CT writes a note specifying the requirements for the refreshment sample, and INSEE carries out the draw from administrative registers. An authorisation from the Comité du Secret is then requested by Dauphine — both for Dauphine itself and for the survey agency — in order for the survey agency to access the addresses. The selected survey agency is not in charge of drawing the refreshment sample and not involved in the process. SHARE Central provides comprehensive guidance for constructing the refreshment sample.

All relevant information can be found in the SHARE sampling guide: https://share-eric.eu/fileadmin/user_upload/SHARE_Working_Paper/SHARE_WP_87-2023.pdf.

- **Are there specific requirements regarding the quality, representativeness, or coverage of the sampling frame used?**

The selected survey agency is not in charge of drawing the refreshment sample and not involved in the process.

- **Can an institutional source such as INSEE be used to build this sample?**

The selected survey agency is not in charge of drawing the refreshment sample and not involved in the process. INSEE in collaboration with the CT is performing that task.

- **Does SHARE provide methodological guidance or specific recommendations for constructing the refreshment sample?**

The selected survey agency is not in charge of drawing the refreshment sample and not involved in the process.

- **What gross volume of addresses is typically required to achieve the target of 1,100 completed interviews?**

To achieve this number in Wave 10, we had 2,628 individuals in the first random batch and 2 additional reserve batches of 1250 individuals each. However, the response was lower than expected and we ended with roughly 1000 interviews. For this number, only one of the reserve batches was fielded. In Wave 11 we plan to decrease the size of the reserve batches and increase the size of the main batch.

- **If we consider only the meetings explicitly specified in the contract (TTT, NTS, and debriefings), we identify a minimum of six structured meetings throughout the project. In practice, how many additional meetings with the Country Team Leader (CTL) should typically be anticipated?**

In general, one in-person meeting is held before and after each sequence of fieldwork (FiRe and Main). Additionally, during each sequence of fieldwork (FiRe and Main), a one-week follow-up meeting is organised every week with the Country Team to monitor progress on the field and discuss possible issues (mostly online meetings). Other exchanges can be done by mail. A meeting can always be set up on demand if the survey agency or CT needs it.

- **Is there an expected reporting and follow-up cadence during the preparation, fieldwork, and project closure phases?**

See above. A meeting can always be set up on demand if the survey agency or CT needs it.

- **Should we anticipate regular meetings for:**

- **Document validation?**

By email mostly. A meeting can always be set up on demand if SA or CT needs it.

- **Sampling activities?**

Sampling is realized by INSEE following the specifications made by Dauphine. If anything goes wrong (for example, interviewer does not succeed in finding the respondent; addresses are not valid), exchanges can be made by email. A meeting can always be set up on demand if SA or CT needs it.

- **Fieldwork monitoring?**

Meetings for fieldwork monitoring are at least one per week. Additional communication by email or over the phone are always possible if needed.

- **Data quality review?**

During the one-week follow-up meeting, we review the progress of the fieldwork and provide flags for each interviewer (identified by their interviewer number) based on various indicators such as the length of their completed interviews, quality of the answers, etc.

- **The Drop-Off questionnaire, which is self-administered in paper format, may require accessibility adaptations. Are there specific requirements for respondents with visual impairments or other disabilities?**

We pay close attention to the number of drop-offs collected. Survey agencies are therefore encouraged to consider the best ways to incentivise interviewers to collect as many drop-offs as possible, including from respondents who may have reading difficulties or other similar challenges.

- **Have any measures been implemented to ensure compliance with the European Accessibility Act (EAA) or other applicable accessibility standards?**

No.



SHARE

SURVEY OF HEALTH, AGEING
AND RETIREMENT IN EUROPE

Nursing home interviews

SHARE Wave 10 Main TTT
17th to 19th Sep 2024



Funded by
the European Union

With funding from the:



Federal Ministry
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Supported by the



National Institute
on Aging



Agenda

1 Why Nursing Homes?

2 Challenges Unique to Nursing Homes

3 Suggestions to Approach Unique Challenges of NH

4 Interviews with a Proxy

Why NH: Scientific aspects

- ▶ SHARE

- ▶ Follows R into nursing homes in all countries
 - ▶ Nursing home respondents are not included in all sample frames, but sometimes end up in our refreshment samples and interviewers should try to interview them
- ▶ Representativeness of the nursing home population is crucial
- ▶ With too few nursing home respondents in the sample, SHARE scientists might...
 - ▶ overestimate the health of the older population and
 - ▶ misrepresent the situation of those who live in nursing homes
- ▶ Questionnaire is shorter for NH respondents
 - ▶ (Not asked: CO, TE, HH, most of EP, parts of AC and HC)

NH interviews are influenced by:



Respondent



Family



Nursing
Home

NH: Legal Challenges

Restrictions governing this could vary from country to country.

- Interviewing the Respondent must be in line with national laws.
 - Consult Country Team Leaders & Operator



Respondent



Family



Nursing Home

NH interviews are influenced by:



Respondent

Dementia

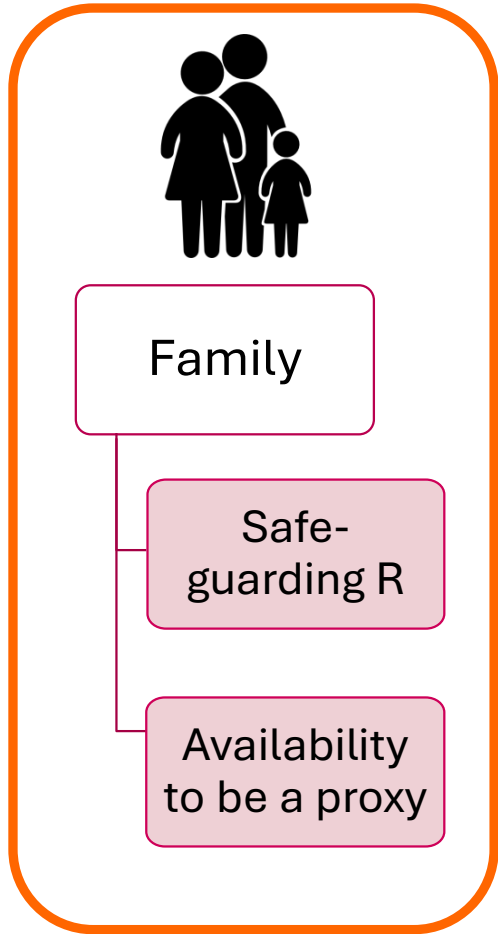
Ill health

Cognitively intact or only mildly cognitively impaired

⇒ Can ask for permission to interview the Respondent directly or with the assistance of a family member, a designated legal guardian, or a staff member.

⇒ Cognitively impaired to such a degree that he/she is unable to understand what it is all about, then we could use a proxy : Family/caregivers

NH interviews are influenced by:



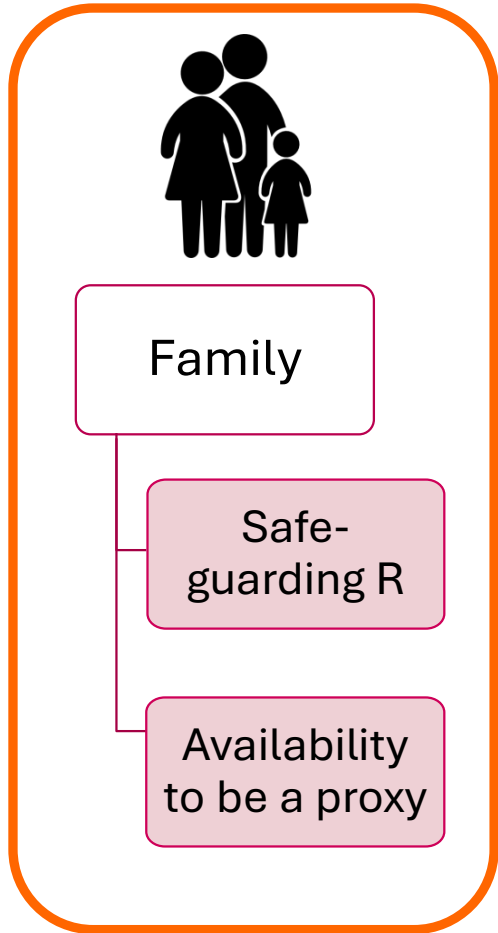
Family members can act as gatekeepers.

⇒ In this role they might be overly protective of the Respondent and try to safeguard them from the interviewers even if the Respondent is willing to participate.

⇒ They may also be cautious as they think such an interview could awaken painful memories and upset the respondent

⇒ Concern about privacy of the respondent and data protection may also influence the family members.

NH interviews are influenced by:



However, family members can also act as facilitators of the interview.

⇒ Oftentimes, proxies need to be involved. If the family member agrees to be a proxy, this could be the best solution since they are very knowledgeable of personal information related to the R.

⇒ Combination of Respondent and proxy (family) doing the interview is also possible

⇒ Interview conducted in the presence of family members could make the Respondent feel secure

NH interviews are influenced by:



Nursing Home

Protection of R

Ethical/legal reasons

Schedule

Nursing Home/Institution

- ⇒ There are some ethical questions that need to be addressed when interviewers want to interview a cognitively impaired Respondent.
- ⇒ There are both cross-national and cross-cultural differences regarding how to approach such people. The survey agency and the Country Team Leader or Operator should consult national legislation for guidance on how to be in compliance with the law when obtaining consent from a severely impaired person.
- ⇒ In addition they may have concerns that the interviewers would disrupt the routines of the nursing home.

Advance Letters

Restrictions governing this could vary from country to country.

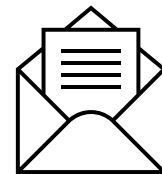
- Interviewing the Respondent must be in line with national laws.
 - Consult Country Team Leaders & Operator



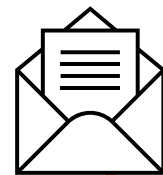
Respondent



Family



Nursing Home



Communication with Letters

- ▶ Special advance letters are often used for
 - ▶ Respondent
 - ▶ Nursing home staff
 - ▶ Family of R
- important that “carer(s)” understand what SHARE is about and why it is important that the respondent participates

NH: Communication with R & Gatekeepers

If it is known the R resides in a NH beforehand

- ▶ The agency sends a letter to the principal/superintendent of the home.
- ▶ The agency sends a letter to respondent.

(Place and date)

Dear

Previously you have been kind enough to participate in our research project SHARE, the Survey of Health, Ageing and Retirement in Europe. Together with information that we have obtained from other older people in [Denmark] as well as in other European countries, your information has contributed to elucidating important issues as to how public policies, cultures, and social and family networks in a variety of European countries influence health and socio-economic status of the growing number of aged people. We take the liberty to contact you again hoping that you would like to assist us one more time. This time we wish to examine which factors determine a healthy ageing process and how to avoid or at least reduce the risk of disability. At the same time we are also interested in determining which diseases and socioeconomic factors that make old age especially difficult to manage. For these purposes, it is very important to follow each particular person and to obtain information on changes since the last interview.

If you agree to participate in the interview, the interview will, as the last time, take place in your present home. An interviewer from the (name of survey agency) will visit you after having made an appointment with you. As we are mostly interested in changes since our last visit, this interview will be shorter and will focus on changes in your health and living conditions, how you manage everyday life and on your ability to remember things. As the last time, and if you are able, we have some small tests which examine your physical functioning. It is voluntary to participate. You may wish to talk to your family/relatives or nursing staff, if any, before you make up your mind. Please note that it is possible to participate in the interview even if you do not wish to participate in the tests, and you may skip any question you like. A relative or someone from the nursing staff is welcome to be present at the visit, if you wish. If you are unable to carry out such an interview, it would be very valuable if one of your nearest relations (i.e. spouse or children) would answer the questions on your behalf. All information will be treated confidentially and no individual information will be passed on to official authorities. No person will be recognizable in any report or in other publications of the results. If you or your family/relatives have any questions about the study, you are very welcome to contact us on telephone (please see our contact information at the bottom of this letter). For practical information in connection with the interview you may contact: Interview leader _____ on telephone _____

Yours sincerely, (name, telephone number and address of the survey agency)

NH COM: Example Advance letter – Nursing Home



ID: HHIDCOM

To the director of the institution XXX
Institution address
Zip-code, City

Paris, <date>

Subject : Participation in the European survey on health, ageing and retirement (SHARE)

Dear Madam, Dear Sir,

University Paris-Dauphine is currently conducting a large-scale survey on health, ageing and retirement in Europe, named SHARE, endorsed by the Ministry of Higher Education and Research and in cooperation with the European Research Infrastructure Consortium "SHARE-ERIC".

The main goal of SHARE, conducted in up to 27 countries every two years, is to describe different aspects of life of persons aged 50 and more as they get older, and to better understand health, economic and social consequences of ageing. For example, the survey allows to study retirement behaviours, inter-generational relationships and disability care.

In <last year of participation>, Mr./Mrs. <NAME_PANEL> had accepted to take part in the SHARE. The information collected from his/her relatives has enabled us to know that he/she is now a long-term resident in your institution. We have sent a letter to inform him/her of this eight wave of the SHARE survey. Indeed, as far as his/her cognitive abilities allow for the interview, his/her participation is of great importance to us, because scientific quality of data collection relies on a long follow-up and repeated participation of respondents. As a consequence, we take the liberty of asking you to facilitate the conduct of this interview. Depending on his/her health condition, the interview can be done with the assistance of a family member and/or a caregiver accustomed to caring for the patient.

The interviews will be carried out by survey agency Kantar TNS, which we commissioned with the implementation of the survey. Your institution will be contacted by a certified interviewer from Kantar TNS in the next few weeks to agree on the time most convenient for conducting this interview.

SHARE is not a compulsory survey. Participation is voluntary and, as guaranteed by law, answers and personal information remain strictly confidential and anonymous. Data are used for non-profit scientific purposes only, as explained on the back of this letter, as well as in the Data Protection Statement that will be handed by the interviewer.

If you have any queries, you can contact the survey agency Kantar TNS via telephone (0 801 800 903, toll-free number, Monday-Friday 09:30-12:30 and 13:30-18:00) or via email (share@tns-sofres.com). You can also visit our website (<http://share.dauphine.fr>) for further information about the study or results of previous waves.

On behalf of the SHARE team, I want to thank you for your attention and for welcoming the interviewer of Kantar TNS in your institution. I hope that Mr./Mrs. <NAME_PANEL> will be able to take part in SHARE once again.

Please accept, dear Madam, dear Sir, the expression of my best regards,

Professor Florence JUSOT (University Paris-Dauphine)
Head of SHARE-France country team

- Information about and the strength of the survey.

- Highlight “R”’s consent to participate in past.
- Importance of participation.

- Ethics
- Contact for additional inquiries

→ important that “carer(s)” understand what SHARE is about and why it is important that the respondent participates

NH: Communication with R & Gatekeepers

If it is known the R resides in a NH beforehand

- Interviewer should try to explain why it is so important that people in nursing homes are interviewed.

To stress:

- ▶ Respondents (unless sampled in nursing homes) participated before, gave permission to be re-contacted
- ▶ Provide information about data protection

Importance:

- ▶ Strength of the study: longitudinal design
- ▶ Refer R/Gatekeepers to the SHARE website

Interviewer Qualities

- ▶ Experienced and older interviewer should be chosen
 - ▶ Diplomacy
 - ▶ Ethical Sense & Respect
- ▶ Interviewer that has conducted the interview last time.
 - ▶ Positive rapport
 - ▶ Comforting

NH interviews - Proxy

- ▶ Oftentimes, proxies need to be involved
 - ▶ Combination of respondent and proxy (family) possible
 - ▶ Interview can be conducted in the presence of family members/nurse/friend so that the respondent feels secure
 - ▶ The R should be aware that the interview can be interrupted if he/she gets tired. The interview can be conducted in stages.

NH interview – Approaches Recap

- ▶ Interviewer should call and try to make an appointment
- ▶ Contact respondent himself/herself first!
- ▶ Use the same interviewer as in the most recent SHARE interview
- ▶ Gain trust of family and nursing home staff
- ▶ Offer to conduct interview with assistance of a proxy
- ▶ Involves tracking and identifying of a proxy (often proxy interviews)
- ▶ Give the R time to consider
- ▶ Leave contact information

Thank you for your attention!

Have you got any questions?

Bluesky



@share-eric.bsky.social

LinkedIn



<http://bit.ly/3Zulium>

www.share-eric.eu

www.share-berlin.eu



► Extra materials for the agency

Example Invitation– Nursing Home Respondent

(Place and date)

Dear

Previously you have been kind enough to participate in our research project SHARE, the Survey of Health, Ageing and Retirement in Europe. Together with information that we have obtained from other older people in [Denmark] as well as in other European countries, your information has contributed to elucidating important issues as to how public policies, cultures, and social and family networks in a variety of European countries influence health and socio-economic status of the growing number of aged people. We take the liberty to contact you again hoping that you would like to assist us one more time. This time we wish to examine which factors determine a healthy ageing process and how to avoid or at least reduce the risk of disability. At the same time we are also interested in determining which diseases and socioeconomic factors that make old age especially difficult to manage. For these purposes, it is very important to follow each particular person and to obtain information on changes since the last interview.

If you agree to participate in the interview, the interview will, as the last time, take place in your present home. An interviewer from the (name of survey agency) will visit you after having made an appointment with you. As we are mostly interested in changes since our last visit, this interview will be shorter and will focus on changes in your health and living conditions, how you manage everyday life and on your ability to remember things. As the last time, and if you are able, we have some small tests which examine your physical functioning. It is voluntary to participate. You may wish to talk to your family/relatives or nursing staff, if any, before you make up your mind. Please note that it is possible to participate in the interview even if you do not wish to participate in the tests, and you may skip any question you like. A relative or someone from the nursing staff is welcome to be present at the visit, if you wish. If you are unable to carry out such an interview, it would be very valuable if one of your nearest relations (i.e. spouse or children) would answer the questions on your behalf. All information will be treated confidentially and no individual information will be passed on to official authorities. No person will be recognizable in any report or in other publications of the results. If you or your family/relatives have any questions about the study, you are very welcome to contact us on telephone (please see our contact information at the bottom of this letter). For practical information in connection with the interview you may contact: Interview leader _____ on telephone _____

Yours sincerely, (name, telephone number and address of the survey agency)