research community. It will contain about 4,000 additional individual interviews in about 2,500 households, plus added generated and imputed variables. We hope that many researchers will take the opportunity to work with these fascinating data.

A final release with the complete data set – about 27,000 individuals – with an extensive set of generated and imputed variables ("Release 2") is planned for the first half of 2006.

7.2 Instruments: LMU, CAPI, DROP-OFF, and CMS

Marcel Das, Corrie Vis, and Bas Weerman

Although the actual fieldwork in SHARE was carried out by a different agency for each country, the programming of the individual instruments was done centrally by CentERdata, a survey research institute affiliated with Tilburg University in the Netherlands. The data were collected using a computer assisted personal interviewing (CAPI) program, supplemented by a self-completion paper and pencil questionnaire. The set-up of this CAPI program allowed each country involved to use exactly the same underlying structure of meta-data and routing. The only difference across countries was the language. This mechanism, where question texts are separated from question routing, enforces the comparability of all country specific translations with a generic questionnaire.

The CAPI program was written in Blaise: a computer-assisted interviewing system and survey processing tool for the Windows operating system, developed by Statistics Netherlands and also used by the US Health and Retirement Survey. The generic CAPI instrument was directly implemented in Blaise, and the generic texts (in English) were stored in an external database. After several rounds of revisions of the generic instrument, the different countries translated their versions of the instrument using the Internet and the so-called Language Management Utility (LMU), developed by CentERdata. Another program was written converting the translated question texts, interviewer instructions, answer categories, fill texts and other instrument texts (like error messages) from the (LMU) database into a country specific survey instrument, based on the blueprint of the generic version. Yet another program was developed to process a paper version of the separate country specific CAPI instruments, as well as the generic English version.

There were only few exceptions to the generic blueprint of the questionnaire. Country-specific parts were introduced when institutions were fundamentally different, e.g. in the health care section. Second, country specifics could be introduced by skipping irrelevant answer categories and by adding new country specific answer categories in the LMU. These exceptions never led to a different sequence of questions for a specific country.

Next to the CAPI instrument, a Case Management System (CMS) was developed to manage the co-ordination of the fieldwork. Only three countries used their own system: France, Switzerland, and The Netherlands. The CMS basically consists of a list of all households in the gross sample that should be approached by the interviewer. Contact notes and registrations, appointments with respondents, and area and case information could be entered in the system, and the system enforced common procedures for re-contacting respondents and how to handle non-response.

Some additional tools that converted the CMS into a complete Sample Management System (SMS) were developed. One tool facilitated the merging of all CMS databases that came back from the field, the preparation for sending the interview data, and the actual sending (via FTP) to the central management team. Another tool generated a progress report on the basis of the CMS databases.

All data that came back from the field were processed, converted to SPSS and STATA

data files and put on a secured web site. The so-called keystroke files, files that register all keystroke activity during the fieldwork, formed the basis for additional files containing information about times spent on different modules and the interview in total.

7.3 Translation Process

Janet Harkness

Due to the complex nature of the SHARE questionnaire, the translation process constituted a considerable challenge. Often, the costs and the effort called for in survey translation are underestimated. Thus, although each participating country in SHARE organised its own translation effort, the central co-ordinator initiated several activities to support the individual translation efforts:

- First, SHARE countries were provided with guidelines recommending how to go about hiring translators, testing translators, organising the translation, and reviewing and assessing the translation. The model advocated followed in simplified form that used in the European Social Survey (see ESS documents at http://www.europeansocialsurvey.org). The guidelines advocated organising a team to complete the translation and to review translations. The team would bring together the language and translation skills, survey questionnaire know-how and substantive expertise needed to handle the SHARE questionnaire modules. In the ESS the translation guidelines are closely linked to procedural specifications that participating countries have to meet. This was not the case in SHARE; participants were offered the guidelines as recommendations. Ultimately each country decided on its own procedures.
- Second, the project co-ordinator commissioned an expert in survey translation to advise SHARE participants on any translation queries they might have.
- Third, the project co-ordinator commissioned a professional review of a sample of the first draft of SHARE translations. SHARE countries were provided with feedback from an external set of translators, each working in their language of first expertise. The translators commented in detail on selected questions and submitted a brief general appraisal of the translation draft, pointing out areas where improvements could be made. This procedure was repeated for a later draft of the questionnaire and feedback again provided to SHARE participants. The pretest-and-pilot design of the SHARE study, coupled with the translation guidelines and appraisals, provided the SHARE project with a rare opportunity to refine and correct the source questionnaire and the translated versions.

7.4 Sample Design

Anders Klevmarken

In the participating SHARE countries the institutional conditions with respect to sampling are so different that a uniform sampling design for the entire project was infeasible. Good sampling frames for our target population of individuals 50+ and households with at least one 50+ individual did not exist or could not be used in all countries. In most countries there were registers of individuals that permitted stratification by age. In some countries these registers were administered at a regional level, Germany and The Netherlands are two examples. In these cases we needed a two or multi-stage design in which regions were sampled first and then individuals selected within regions. In the two Nordic countries Denmark and Sweden we could draw the samples from national population registers and thus use a relatively simple and efficient design. In France and Spain it be-