

3rd European Quality of Life Survey

Translation report

EU27 and non-EU countries

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3rd European Quality of Life Survey Translation Report

The translation report for the 3rd European Quality of Life Survey describes the translation process of the EU27 in chapter 1, the translation process in the EU candidate and IPA countries in chapter 2, and Iceland in chapter 3.

I. Translation report EU27

1. Background information

Overall the EQS survey was conducted in 34 countries. In autumn 2011, the European Foundation for the Improvement of Living and Working Conditions (Eurofound) fielded the 3rd European Quality of Life Survey (EQS) in the 27 EU Member States, with the 7 non-EU countries following suit in 2012.

1.1. The translation challenge

The EQS is a cross-cultural survey, which asks the same questions in all participating countries. This requires the translation of the questionnaire to all target languages, which is one of the most challenging parts of the survey's preparation. At the same time translation is crucial for the quality of the survey, affecting the comparability of the data. The translated versions of the questionnaire have to be comparable in the following ways:

- The meaning has to be the same (within the boundaries of the target language)
- The question format has to be the same
- The measurement properties have to be the same (range of response options)
- They have to maintain the stimulus the original question provokes/incites
- The questions have to be at the same time consistent over time, comparable across countries, and across population (language) groups

1.2. Eurofound's approach

To comply with the above criteria, Eurofound has designed a translation process plan, which is the result of an ongoing learning process based on Eurofound work on surveys. More specifically, the translation process for the 2011 EQS was informed by the observations during the questionnaire development process and by the experience of the European Working Conditions Survey 2010.

With the aim of developing a valid and reliable measurement instrument, which is internationally comparable, the following steps were taken:

1. For each language, two independent experts translated the questionnaire into local languages
2. Each questionnaire was backtranslated into English
3. The translations were validated by Eurofound

1.3. Trend vs. new questions

Apart from international comparability, it was important that the survey is consistent over time. The EQS was implemented twice before 2011 (in 2003 and 2007), and about 50% of the 2011 questionnaire items have already been asked in the past. During the translations it was necessary to make a distinction between these trend questions and new questions in order to ensure the consistency of trend data. Instead of retranslation, the trend questions were reviewed by the project

managers of national agencies, and modifications were proposed only in case some inconsistencies were found.

2. The translation process

The questionnaire was translated to 25 languages. There are 31 unique language versions (31 different questionnaires); altogether there are 38 country versions, as sometimes the same version was used in different countries (e.g. Lithuanian Russian and Estonian Russian are separately counted).

2.1. Questionnaire development and pre-test

After the development of the 2011 EQLS questionnaire with the help of the EQLS Questionnaire Development Group, GfK Significant EU3C conducted a pre-test in Belgium and the United Kingdom to test the improved 2011 questionnaire. The pre-test used a mixed method approach where the questionnaire was tested qualitatively using cognitive interviewing ($n=30$) and quantitatively ($n=61$) using face to face interviewing. For the pre-test the questionnaire was translated to French and this translation was validated by Eurofound.

2.2. Translation to all languages and pilot

After the pre-test the questionnaire was adapted and translated into languages of EU27. The translated questionnaires were tested in a pilot phase ($n=25$) in each EU27 country. After this the pilot results were used to adapt the questionnaire for the main field phase. Eurofound approved the final version of the questionnaire for the main fieldwork on 12 September 2011.

On the basis of an approved translation plan, the translation process for EQLS was elaborate and consisted of the following phases: First of all

- the national survey agencies were briefed by EU3C team (16 May 2011), received written translation instructions (see Annex 1) and were given a translation guide (See excerpt in Annex 2)
- Translation of the 9 May 2011 master English questionnaire into the languages of the EU 27 Member States by two independent local translators whose CVs were approved by EF in advance
- Translation of the glossary and review of the ISCED categories by the national project managers and translation of the contact sheet by TranslateMedia
- Back-translation of the questionnaire by TranslateMedia (independent translation agency)
- Validation of the translations by EF except for Danish, Estonian, Greek, Latvian, Maltese, Romanian, and Polish that were validated by the fieldwork coordinator)
- Review and finalisation by EU3C.

Table 1: Survey countries and languages

Belgium	Dutch	French	
Bulgaria	Bulgarian		
Czech Republic	Czech		
Denmark	Danish		
Germany	German		
Estonia	Estonian	<i>Russian</i>	
Greece	Greek		
Spain	Spanish	Catalan	
France	French		
Ireland	<i>English</i>		
Italy	Italian		
Cyprus	Greek		
Latvia	Latvian	<i>Russian</i>	
Lithuania	Lithuanian	<i>Russian</i>	
Luxembourg	French	German	Luxemburgish
Hungary	Hungarian		
Malta	Maltese	<i>English</i>	
Netherlands	Dutch		
Austria	German		
Poland	Polish		
Portugal	Portuguese		
Romania	Romanian		
Slovenia	Slovene		
Slovakia	Slovak	<i>Hungarian</i>	
Finland	Finnish	<i>Swedish</i>	
Sweden	Swedish		
United Kingdom	<i>English</i>		

The translation of the Master questionnaire was done in Excel using a central template designed by EU3C. This method ensures consistency and allows tracking down the different steps relatively easily by following the different columns. Information regarding corrections and modifications to the translation during the different phases in the translation process are logged in detail in separate columns in the excel translation files.

The excel translation files of the main questionnaire contain a last column for Eurofound to offer feedback on the translation phases, and are structured as follows:

Column	Action
A	Question number
B	2007 question number
C	Action required
D	Comments
E	Change in trend (yes/no)
F	Question ID (for dataprocessing purposes)
G	Response ID (for dataprocessing purposes)
H	English master
I	Local translation 1
J	Local translation 2
K	Final translation (based on translation 1 and 2)
L	Logbook translation
M	Backtranslation
N	Logbook backtranslation
O	Eurofound validators's comments

Translation

For each language, two local translators working independently from each other translated new questions and those that were modified. These were then reviewed by the local project manager at the national agencies. Trend questions and those that were only slightly modified were taken from 2007 EQLS questionnaires and reviewed by the local project manager at the national agencies.

Back-translation

- The project managers logged all decisions taken during the process in the translation file. The translated versions were then send to TranslateMedia who back-translated the local translations into English
- TranslateMedia could only see the final translations. The columns with the master English questionnaire, the two national translations and the comments were hidden and locked
- Only the new and modified questions were back translated
- After back-translation EU3C compared the back-translation with the English master and flagged any issues with the local project managers
- The local translations of the English master were then sent to EF for validation between 20/06 /2011 and 05/07/2011.

Validation

After back-translation a native speaker carried out a translation validation exercise independent of the translators. The validation exercise has also been recorded in detail in the translation logbook.

The post back-translation was again compared to the English master. Possible translation errors were identified by focusing solely on the wording of the items. In case of translation errors a final correction was made. This step finally resulted in a post validation translation in the target languages.

Eurofound validated 14 languages, 19 language versions.

Finalisation

After this the local translations were finalised by incorporating the post-validation version in column P of the Excel translation files (except for the languages that weren't validated). The local pilot version is always highlighted in yellow in the translation files which record the entire translation process (see for example Annex 3). The agencies then tested their language versions to check any routing and scripting issues which they provided on a centrally designed revision feedback sheet. Most of the scripting issues were covered, though some were recorded to be changed post pilot. Based on the pilot revision sheet (see Annex 4) the final adaptations could be done to make the questionnaire ready for the main field phase.

The **glossary**, a document accompanying the questionnaire, which provides additional information and explanation on many of the questions, was also translated and validated in this phase. During the validation process some issues arose which led to the amendment of the glossary. These amendments were communicated to the national agencies. There were further revisions which were noted in the glossary but which still needed to be dealt with in the final translations. In the final translation phase of the glossary GfKEU3C, together with the local project managers adapted the remarks.

The ISCED categories and codes were validated as a separate process and resulted in a pilot ISCED file. Again by looking into the country comments on the revision sheet the ISCED was reviewed and adapted for the final field phase (see ISCED excel file on octopus). The showcards are of course based on the questionnaires.

2.3. Translation work after the pilot

After the pilot phase a few questions in the **main questionnaire** were adapted. These questions were highlighted in the translation master file in blue (see Annex 5). An independent translation agency translated these adaptations (TranslateMedia) in all local languages. The local project managers double checked the translations. After this GfK EU3C provided each country with a printable excel of the questionnaire in the local language (documents also provided to Eurofound). The same process was used for the **showcards** for which countries also were provided with a printable excel version (documents provided to Eurofound).

For the **glossary** we went through the same process though the files were word files. Changes to the master glossary were highlighted in blue. An independent translation agency translated these adaptations (TranslateMedia) in all local languages. This master glossary translation was then send to the local project managers for extra language validation and can be found in Annex 6.

While the **contact sheet** was tested in the pilot and revised after the pilot feedback, the contact sheet was translated in the local languages by TranslateMedia after the pilot. Same as with the questionnaires and the glossaries, local project managers checked the translation of the paper contact sheet. After this the countries were provided with a printable excel version of the contact sheet (Annex 7). The **introduction letter, national briefing documents, and 'Sorry you were out'** cards were translated by the countries and sent to Eurofound.

II. Translation report EU Candidate and IPA countries

1. Introduction

Given the fact the EQLS will be implemented for the first time in Serbia, Kosovo, Montenegro and FYROMacedonia, and taking into account the fact that Croatia and Turkey exhibit certain particular features as seen in analysis of previous EQLS data, we opted for a more extensive translation process including cognitive interviews in all the six countries.

The translations of the EQLS Master Questionnaire into the national languages of the EU candidate and IPA countries have been submitted in electronic (EXCEL) format. GfK EU3C also provided the translations of the other materials to be used during the fieldwork: briefing instructions interviewers, introduction letter, 'Sorry you were out'-cards, glossary, and contact sheet. Showcards will be designed prior to the fieldwork in 2012.

Eurofound's staff reviewed and validated fieldwork material in Croatian, Serbian and Ijekavski Montenegrin. For the languages Turkish, Macedonian and Albanian Eurofound had no in-house expertise available. Therefore the relevant agencies were asked to review the materials based on the recurring comments provided by Eurofound for the other three languages.

The translations of the fieldwork materials are accepted as final for the purposes of the preparatory phase for the EQLS in the EU candidate and IPA countries.

Later, in the implementation stage prior to the fieldwork in 2012, the questionnaires and routing instructions will be converted in the format suitable for use in the field. The field materials will be updated and reviewed again.

In addition the materials in the second language that will be used in a country will be adapted to specificities of that country. In this stage the materials will also be converted into Cyrillic alphabet for Serbia, Kosovo and Montenegro. The final questionnaires will then be used for designing the showcards.

Country	Responsible for language	Second language
Croatia	Croatian	/
FYROM	Macedonian	Albanian
Turkey	Turkish	/
Kosovo	Albanian	Serbian Latin Serbian Cyrillic
Serbia	Serbian Latin	Hungarian Serbian Cyrillic
Montenegro	Montenegrin	Serbian Latin Serbian Cyrillic

In this chapter of the translation report we describe the different stages of the translation process and the outcomes in the EU candidate and IPA countries.

2. Translation process

The translation process in the EU Candidate and IPA countries consisted next to a **first translation** and a **back-translation** also of a **translation validation process including a number of cognitive interviews**.

For each language, the translation team comprised a project manager, two independent translators and a person responsible for the translation validation process and cognitive interviews.

First of all, the national agencies were briefed by **GfK EU3C's team** and received written translation instructions and a translation guide (see appendices). Next, the following actions were taken:

- Translation of the 9 May 2011 master English questionnaire (pilot version) into the languages of the EU Candidate and IPA countries by the local translation team
- Translation of the glossary and review of the ISCED categories by the local translation team
- Back-translation of the questionnaire by TranslateMedia (independent translation agency)
- Translation validation exercise
- Cognitive interviews (described in the next chapter)

The post validation translations of the main questionnaire (including showcards), the local ISCED coding and glossary in the languages of the EU Candidate and IPA countries are offered to Eurofound for validation. Upon receiving the feedback from Eurofound **GfK EU3C** reviews and finalises the translations in cooperation with the local translation teams.

For the translation of the master questionnaire in Croatian, Macedonian, Albanian and Turkish the same Excel template as for the EU27 countries was used. This template ensures consistency and allows tracking down the different steps relatively easily by following the different columns.

In addition, information regarding corrections and modifications to the translation during the different phases in the translation process are logged in detail in separate columns in the excel translation files.

The excel translation files of the main questionnaire contain a last column for Eurofound to offer feedback on the translation phases, and are structured as follows.

Column	Action
A	Question number
B	Question ID (for dataprocessing purposes)
C	Response ID (for dataprocessing purposes)
D	English master (2057 ENG)
E	Local translation 1
F	Local translation 2
G	Final translation (based on translation 1 and 2)
H	Logbook translation
I	Back-translation
J	Logbook back-translation
K	Post back-translation
L	Logbook validation
M	Post validation
N	Feedback Eurofound

Example:

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	Question number	Question Id	Response Id	2057(ENG)	Local translation 1 (translator 1)	Local translation 2 (translator 2)	Final translation (project manager)	Logbook - IN ENGLISH (project manager)	Back translation	Logbook back translation	Post back translation	Logbook Validation	Post Validation
2	dataprocess1	1	-1_startstart										
3	dataprocess1	2	-1_INT10_INT10										
4	dataprocess1	3	-1_INT102_INT10										
5	dataprocess1	170	-1_INTRVID										
6		61	-1_COUNTRY_INT1:	Please code the									
7		61	264 the United Kingdom										
8		61	733 Belgium										
9		62	-1_language:Choose										
10		62	277 English										
11		62	732 Français										
12	dataprocess1	188	-1_amount										
13	dataprocess1	188	978 amount										
14	dataprocess1	63	-1_NATIONALITY_NATIO										
15		63	278 United Kingdom										
16	HH0	4	-1_HHO (INT): ENTER THE ANK ID NUMBER which is the link with the listpage	HH0 (АНК): Внесете го ЕДИНСТВЕНИОТ ИДЕНТИФИКАЦИЈСКИ БРОЈ на испитаникот од контакт листата	HH0 (АНК): Внесете го ИДЕНТИФИКАЦИЈСКИ БРОЈ (бр) на испитаникот од контакт листата			HHO (АНК): Enter the identification number of the subject from the listpage		HH0 (АНК): Enter the identification number of the subject from the listpage		HH0 (АНК): Внесете го идентификацискиот број на испитаникот од контакт листата	
17	dataprocess1	21	-1_HOUSEHOLDHOUSE	HH1: Би сакал/а да започнам со неколку	HH1: Би сакал/а да започнам со неколку	HH1: Би сакал/а да започнам со неколку							
18	HH1	5	-1_HH1If I'd like to start by asking you a few questions about your household, including yourself, can you please tell me how many people live in this household?	Можете ли да ми кажете колку луѓе живеат во Вашето домашинство, вклучувајќи Ве и	Можете ли да ми кажете колку луѓе живеат во Вашето домашинство, вклучувајќи Ве и	Можете ли да ми кажете колку луѓе живеат во Вашето домашинство, вклучувајќи Ве и							
19	HH2a	7	-1_HH2a(INT): CODE THE GENDER OF	HH2a(АНК):ЗАПИШТЕ ГО ПОЛОГ НА ИСПИТАНИКОТ	HH2a(АНК):ЗАПИШТЕ ГО ПОЛОГ НА ИСПИТАНИКОТ	HH2a(АНК):ЗАПИШТЕ ГО ПОЛОГ НА ИСПИТАНИКОТ							
20	HH2a	7	13 Male	Машки	Машки	Машки							
21	HH2a	7	14 Female	Женски	Женски	Женски							
22	HH2b	8	-1_HH2b:Starting with yourself, what was	HH2b:Почнувајќи од себе, колку години имате на	HH2b:Почнувајќи од себе, колку години имате на	HH2b:Почнувајќи од себе, колку години имате на							

For Serbian and Montenegrin separate word files were used for the questionnaire translations and the translation logbook. In the logbook space is provided for Eurofound to offer feedback on the translation phases.

The translation files for each language (main questionnaire and translation log) are provided in the appendices.

3. Translation

For each language, two local translators working independently translated the questions. As this will be the first time EQLS is carried out in Kosovo, Montenegro and Serbia all the questions were translated into Montenegrin and Serbian. For Albanian, Croatian, Macedonian and Turkish only the new questions and those that were modified had to be translated. For the latter languages the trend questions and those that were only slightly modified are to be taken from 2007 EQLS questionnaires and reviewed by the local translation teams. The local translation teams reviewed the translated questions and logged all decisions taken during the process in the translation logbook.

4. Back-translation

The translated versions were then send to TranslateMedia who back-translated the local translations into English.

- TranslateMedia could only see the final translations. The columns with the master English questionnaire, the two national translations and the comments were hidden and locked
- For Croatian, Macedonian, Albanian and Turkish only the new and modified questions were back-translated. For Montenegrin and Serbian for all the questions a back-translation was provided.
- On the basis of the back-translation the local translation team carried out a translation control: they compared the back-translation to the English master to check for discrepancies in meaning (not word choice). In the case of discrepancies these were verified with the translators and if necessary corrected and logged in the logbook. This resulted in a post back-translation.

5. Validation

After back-translation a native speaker carried out a translation validation exercise independent of the translators. The validation exercise has also been recorded in detail in the translation logbook. The post back-translation was again compared to the English master. Possible translation errors were identified by focusing solely on the wording of the items. In case of translation errors a final correction was made. This step finally resulted in a post validation translation in the target languages.

The key findings on the translation process were written down by the national agencies in the national country reports (see appendices).

General findings on the translation process of the main questionnaire

Croatia (Croatian)

The back translation of both the new/modified and trend questions provided an excellent match with master questionnaire and no extra issues needed to be solved.

FYROM (Macedonian)

With regard to the trend questions some minor reformulations were made. In general, the new questions were clear and understandable. After the back-translation some fine-tuning was undertaken.

Turkey (Turkish)

Regarding the trend questions, there were no significant discrepancies in the meaning of the translated questions. There are some slight modifications in translation in certain questions (HH2d, HH3d, Q3, ...). Regarding the new/modified questions, the instructions in the translation logbook were followed to translate/amend the questions accordingly; no major issues encountered.

Kosovo (Albanian)

The new questions were easy to understand and with appropriate wording. The translation phase of the trend questions went smoothly. There were almost no changes in the question formulations and some small changes were noted in the translation files.

Serbia (Serbian)

With regard to both the trend and new/modified questions few differences between the two independent translations were identified. They were verified and corrected or adjusted in the final translation. Also in Serbia it was felt that the amount in Q35e was too low (10 EUR) to face an emergency, and is now calculated as 60% of average monthly income, i.e. 200 EUR.

Montenegro (Montenegrin)

For the both the trend and new/modified questions only a few substantial differences between the two independent translations were identified. The translated phrase with the best correspondence with the master questionnaire was kept in the final translation. For Q35e it was felt that the amount was too low (15 EUR) to face an emergency, and is now calculated as 60% of average monthly income, i.e. 250 EUR.

Other documents

Next to the questionnaire the **glossaries** were translated by the local translation teams and will be finalised upon the outcomes of the cognitive interviews.

The **showcards** are based on the questionnaire and are referred to in the questionnaires in the local languages.

6. Cognitive interviews

6.1. Introduction

The aim of the cognitive interviews is to test that the language is properly understood and that the questions read naturally, the focus being to ensure that the translations are correct and fluent. Based on the cognitive interviews we also evaluate how the main concepts of the questionnaire are perceived by the respondents, check the adequacy of interviewer guidelines and glossary and draw information that could be applied or emphasized in interviewer training as well as, possibly, in data interpretation (later on). As such the cognitive interviews are part of the translation validation process.

This exercise has been carried out as part of the overall translation process and took place after the back-translation of the questionnaire. For each language 5 cognitive interviews have been conducted:

Country	Country code	Responsible for validation in	Number of cognitive interviews
Croatia	HR	Croatian	5
FYROM	MK	Macedonian	5
Turkey	TR	Turkish	5
Kosovo	KO	Albanian	5
Serbia	RS	Latin Serbian*	5
Montenegro	ME	Ijekavski Montenegrin*	5

*With regard to **Serbian and Montenegrin**, we note the following:

- In Serbia, Latin Serbian was used for the cognitive interviews (people can read both alphabets as they are both used in school system).
- In Montenegro, the Ijevaski dialect was used for the cognitive interviews. Standard Montenegrin is exactly the same as Latin Serbian. The local agency had informed us that there are few people who speak Standard Montenegrin, although it is understood well.

6.2. Fieldwork organisation

The **EQLS Central Coordination Team** of **GfK EU3C** managed the process of cognitive interviewing and captured the findings based on the reports of the agencies.

Sampling for the cognitive interviews was realised by means of convenience sampling. Considering the aim of this exercise it was important to interview different types of respondents. We therefore used quotas for gender, age and education as these are characteristics which tend to influence the way questions are answered.

The definition of the quota variables was as follows:

- In terms of education: 1 respondent with a university degree, 1 respondent who left full-time education between the ages of 16-19 and 1 respondent who left school aged 15 or younger.
- In terms of gender: at least 2 men and 2 women.
- In terms of age: 1 respondent aged 18 to 29, 1 respondent aged 30 to 39; 1 respondent aged 40 to 49, 1 respondent aged 50 to 65 and 1 respondent aged 65 or older.

The following table gives an overview of the characteristics of the respondents for each language:

Country	Responsible for validation in	N of Respondents	Education			Gender		Age				
			15-	16-19	University	M	F	18-29	30-39	40-49	50-65	+65
Croatia	Croatian	5	2	1	2	2	3	1	1	1	1	1
FYROM	Macedonian	5	1	2	2	2	3	1	1	1	1	1
Turkey	Turkish	5	1	3	1	2	3	1	1	1	1	1
Kosovo	Albanian	5	2	2	1	2	3	1	1	1	1	1
Serbia	Latin Serbian	5	2	2	1	2	3	1	1	1	1	1
Montenegro	Ijekavski Montenegrin	5	1	2	2	3	2	1	1	1	1	1

The cognitive interviews have been conducted by national researchers, native in the target language, who are familiar with the concepts of the questionnaire and are independent of the translators. The local team was briefed on the background to the survey, the interview protocol, the content of the questionnaire and the glossary with particular reference to the new questions. The cognitive interviews took place between end August-early October 2011.

Country	Fieldwork period	
	Cognitive interviews	
Croatia	19 th September – 23 rd September	
FYROM	30 th September – 4 th October	
Turkey	30 th September – 4 th October	
Kosovo	30 th September – 4 th October	
Serbia	24 th August – 29 th August	
Montenegro	25 th August – 26 th August	

The following materials were used for the cognitive interviews:

- A PAPI version of the questionnaire in the target language which allows for sufficient place to note down comments and remarks.

The questionnaire for cognitive interviewing consisted of a stripped down version of the main questionnaire.

The following questions were incorporated in the cognitive version of the questionnaire:

Short version of the household grid, Q2, Q4, Q7c, Q8, Q9, Q10, Q11, Q16, Q21, Q22, Q23, Q27, Q28, Q29, Q38, Q39, Q40, Q43, Q44, Q46, Q47, Q48, Q51, Q52, Q53, Q54, Q55, Q56, Q57, Q60.

- A glossary in the target language.
- An interview protocol consisting of non-scripted probes (giving interviewers a series of areas to cover during the interview without needing to read out verbatim prompts).
- An analysis protocol which is based on qualitative analysis methods

The cognitive interviews were conducted using the “think-aloud” approach, which made it necessary to focus on key probing feasible to be carried out within the interview time limit of one hour.

- Asking the respondent to think aloud as he/she answers each survey question. The interviewer had to provide frequent neutral probes to aid the respondent and to note down the respondents' thoughts and remarks.
- Follow-up probes in the form of direct questions to mainly uncover respondent' difficulties with specific terms or phrases and (possibly) to uncover whether the respondent is able to recall necessary information from memory.
- Asking the respondent to paraphrase a question in his/her own words to test the respondents' understanding and meaning of the survey questions.

The cognitive interviewers were briefed to probe further at any questions where the respondent seemed to have particular difficulty, or where it was apparent from the think-aloud process or from their response that the respondent had misunderstood the question. In addition there were specific probes where it was identified in advance that there was potential for confusion or misunderstanding. Notes were made on the paper questionnaire they were interviewing from.

Each researcher prepared a brief report on the outcome of the exercise using a report template provided by **GfK EU3C**.

6.3. Findings

The information obtained at this exercise enabled the researchers to make informed suggestions where they found issues in the translation of the master questionnaire into the target language and in the understanding of the translated questions. In the languages which were covered by the 2007 EQLS (Albanian, Croatian, Macedonian and Turkish) the trend items were treated differently from the new or modified items:

- Trend items: changes in the wording were only proposed in the case of mistakes – where the translation was wrong or where the translated question refers to a concept other than that described by the English master question.
- New or modified survey questions: the researcher was allowed to suggest better alternative translations.

For more details on the outcomes we refer to the Report on the preparatory phase in the EU candidate and IPA countries.

7. Review by Eurofound and GfK EU3C

On the basis of the outcomes of the translation process, the validated translations were subjected to a final review by the Coordination Centre GfK EU3C in cooperation with Eurofound. In addition, the changes that were made to the final master of the questionnaire for the EU27 (version of 9 September 2011) have been implemented in the questionnaire translations of the candidate and IPA countries.

For the languages Croatian, Serbian and Ijekavski Montenegrin Eurofound has expertise in-house, and its staff members reviewed the translations. Upon their feedback the questions in the questionnaire were or adjusted by the agency responsible for the target language. For the other languages, Turkish, Macedonian and Albanian the national agencies were asked to re-check their translation based on the recurring comments Eurofound provided for the three languages validated by their staff.

III. Translation report IS

1. Introduction

After the inclusion of the CC3 and IPA countries in the EQLS survey, it was decided by Eurofound to include Iceland as well. It's the first time the EQLS survey will be carried out in this country.

Country	Responsible for language	Second language
Iceland	Icelandic	/

In this chapter of the translation report we describe the different stages of the translation process and the outcomes in Iceland.

2. Translation process

The following table lists all documents that needed to be translated into Icelandic.

Document	Document format
Briefing instructions	Word
Introduction letter	Word
Sorry-you-were out card	Word
Glossary	Word
Contact sheet	Excel
Main Questionnaire	Excel

For the translation of the **briefing instructions, the introduction letter, the sorry-you-were out card, the glossary and the contact sheet**, the English master version of each of these documents was provided to the local agency. The documents were translated in a straight forward manner and in the same document format as provided. The final local translations of all documents were offered to Eurofound for validation. Upon receiving the feedback from Eurofound the Coordination Centre reviewed and finalised the translations in cooperation with the local translation team.

For the translation of the **main questionnaire**, no previous local questionnaire was available. The English master questionnaire was provided to the local translation team.

The **translation team** comprised a project manager, two independent translators and a person responsible for the back-translation. The CV's of the translators were approved by Eurofound. The translation team was briefed, monitored and supported by **GfK EU3's team** during the entire process.

The **translation process** for Iceland for the main questionnaire consisted of a **first translation** and a **back-translation**. All questions of the questionnaire needed to be translated and back-translated. The additional step of cognitive interviews as realised within the CC3 and IPA countries was left out. The timing for translating all documents in Icelandic was rather short as to be able to join the other countries at the same moment for the implementation phase.

The following table represents the **steps in the translation process** and the **timeschedule**.

Translation stage	Description	Timeschedule
First translation	Local translation 1 (translator 1) Local translation 2 (translator 2) Final local translation (project manager)	13 March 2012 16 March 2012 22 March 2012
Back translation	Back-translation (back translator) Review back-translation (GfK EU3C)	26 March 2012 30 March 2012
Finalisation	Feedback Eurofound Icelandic translation for pilot phase Icelandic translation script Icelandic translation for main phase	5 April 2012 10 April 2012 13 April 2012 May 2012

For the translation of the master questionnaire in Icelandic a similar **Excel template** as for the EU27 countries was used. This template ensures consistency and allows tracking down the different steps relatively easily by following the different columns. In the last column of the excel translation file of the main questionnaire Eurofound offered his feedback on the translation.

Column	Action
A	Question number
B	English master
C	Question ID (for dataprocessing purposes)
D	Response ID (for dataprocessing purposes)
E	Local translation 1
F	Local translation 2
G	Final local translation (based on translation 1 and 2)
H	Back-translation
I	Review back-translation
J	Comments/feedback Eurofound

3. Translation

Two independent translations were performed by two local translators. Each local translator translated the questionnaire from English into Icelandic. There was no contact between the translators. They performed the translation separately in the excel template (local translation 1 and local translation 2). As this will be the first time the EQLS survey is carried out in Iceland all questions were translated into Icelandic.

These local translations were then reviewed by the local project manager at the national agency, who compiled one final local translation. The local agency asked to only show the monthly income levels at the income question (Q64). Though to be consistent with all other countries, it was decided to offer all income possibilities (weekly-monthly-yearly) also to the respondents in Iceland.

The ISCED categories used in the questionnaire (Q48) were provided by the local agency and reviewed by Eurofound.

4. Back-translation

The final local translation was then back-translated into English using the same translation template. The back translator could only see the final local translation in the excel translation file; the other columns were hidden and locked. A back-translation was provided for all questions.

After the back-translation GfK EU3C compared the back-translation with the English master and flagged any issues/discrepancies in meaning.

5. Finalisation

The translated version and back-translation were sent to EF for validation. After this, the local translation team finalised the questionnaire taking into account the back-translation feedback and Eurofound's comments.

This finalised Icelandic questionnaire was programmed for conducting the pilot interviews. The showcards were designed based on this questionnaire version.

During the pilot field preparation, in testing the questionnaire script, it became clear that some adjustments were needed. The local agency listed the required revisions in the revision sheet that was provided by GfK EU3C. The revisions concerned text changes only. Consequently, also the showcards and glossary needed to be adjusted. The final Icelandic version of the questionnaire, the showcards and glossary will be delivered to Eurofound.

The Icelandic promocard was reviewed by the local agency and a final version was designed together with Eurofound. The last document to be translated in Icelandic concerned the back check questionnaire which will be used during the main field phase.

IV. Annexes

ANNEX 1: TRANSLATION INSTRUCTIONS

3rd EQLS Translation Briefing Instructions

Introduction

Please find herewith the briefing instructions for the translation of the EQLS3 questionnaire. As you know, this process involves three stages:

1. The first translation
2. The back-translation
3. The finalisation of the translation

The instructions in this document refer primarily to STAGE 1 OF THE TRANSLATION PROCESS.
(For your information, the back-translation will be done by an independent translation agency.)

These instructions are for the local project managers and the two independent translators selected for each respective (national) language.

The languages which need to be translated are:

Country	Languages
Belgium	Dutch, French
Bulgaria	Bulgarian
Czech Republic	Czech
Denmark	Danish
Germany	German
Estonia	Estonian, <i>Russian</i>
Greece	Greek
Spain	Spanish (Castilian), Catalan
France	French
Italy	Italian
Cyprus	Greek
Latvia	Latvian, <i>Russian</i>
Lithuania	Lithuanian, <i>Russian</i>
Luxembourg	French, German, Luxemburgish
Hungary	Hungarian
Malta	Maltese
Netherlands	Dutch
Austria	German
Poland	Polish
Portugal	Portuguese
Romania	Romanian

Country	Languages
Slovenia	Slovene
Slovakia	Slovak, <i>Hungarian</i>
Finland	Finnish, <i>Swedish</i>
Sweden	Swedish
Croatia	Croatian
FYROM	Macedonian, Albanian
Turkey	Turkish

Languages in red italics do not need to be translated by all countries separately. Russian will be translated in Estonia and provided to Lithuania and Latvia. Hungarian will be translated in Hungary and provided to Slovakia. Swedish will be translated in Sweden and provided to Finland.

If so required, the English master questionnaire may be adapted to British English in the UK and to local English in Ireland and Malta. Any changes must be recorded by the project managers in the translation file by providing the adapted version in column G of sheet 3 and by describing the change in column H.

Documents you will receive

For the translation process, you will receive the following documents:

1. The English master questionnaire EQLS2011 (PDF)
2. The previous translations EQLS2007 (PDF) and supporting documents or links.
3. A translation guide (Excel)
4. The translation file (Excel) – a separate file for each of your country's respective languages; in this file the translation of the questions and related actions will occur!
5. The English glossary EQLS2011 (Word)

The EQLS3 questionnaire

The ENGLISH MASTER QUESTIONNAIRE consists of 67 questions (+/- 160 question items). In terms of translation actions, there are three types of questions:

- **New questions**
- **Modified questions** (here there will be 2 actions, we will explain this below)
- **Trend questions** (asked in the EQLS 2007; except for Q11 – EWCS2005 and Q52 – EQLS2003)

In the English master questionnaire, you will see the reference to the type of question above the question. You will see:

- Whether the question is new
- If it is a trend question, the question number in the previous survey
- And also for trend questions – if it was modified (and what was modified)

Please ignore the highlights in yellow in the questionnaire. These were used to mark the changes from the March 2011 pre-test version (in the UK and Belgium) to this latest version.

Approximately one third of the questions are new or modified to a significant extent. These questions will need to be translated by two independent translators.

The trend questions and those that have been modified slightly are for the local project manager to work on.

Previous translations

The project managers need to review the previous trend questions. For this, you have received the EQLS2007 translations in PDF.

Please note that for the review of Q11 project managers should refer to the 2005 EWCS questionnaire (Q41) which can be found on
<http://www.eurofound.europa.eu/surveys/ewcs/2005/translatedversions.htm>.

Eurofound could not provide us with translations for Q52 which was asked on the 2003 EQLS (Q53). However, if your agency carried out the survey in 2003, you may still have the translation and if so, please insert this in column G. In that case, you should treat this question as "Trend: review". If you do not have a translation, please treat the question as "New". In the section entitled "the translation action", we explain what you need to do for the different types of questions in more detail.

Translation guide

The TRANSLATION GUIDE (in excel format) provides you with the translation instructions for each question item. In this guide, you will also find annotation notes, which explain the more complex concepts or words.

The translation file

The TRANSLATION FILE will be your working document for the translations of the questionnaire.

You will receive this file separately for each language. The file consists of three separate sheets:

1. Translation 1
2. Translation 2
3. Project manager

The local project managers are the ‘owner’ of this file. For each local language, they give the sheet “Translation 1” to one translator and the sheet “Translation 2” to the other. Afterwards they compile the two translations on sheet 3 and log any changes.

As noted above, a separate file needs to be submitted for each local language. Each file should be saved under the following name:

- Eqls3_translationfile_country_[namelanguage].xlsx

The translation actions

As noted, there are different types of actions that need to be done. Firstly, there is a distinction between translation actions at the question level and those at the overall level.

TRANSLATION ACTIONS AT THE QUESTION LEVEL

- **“Trend: review”**
 - Action: The local project manager reviews the previous translation in comparison to the English master. Only questions where a significant discrepancy in the meaning of the translated question and the English question are found should be flagged. In these instances, the local project manager explains the discrepancy and suggests a revised/new translation. They use column G, sheet 3 of the translation file (see next section) for the new/revised translation and log their reasoning in column H. This applies only to those questions where a change has been recommended.

It is not necessary to incorporate the previous translations into the translation file. We will do this afterwards.

- **“Modified: adapt”**
 - Action: The local project manager adapts the original translation to reflect the modification and logs the change.
- **“New: translate” and “Modified: translate”**
 - Action: Each question/item is translated by the two independent translators. The local project manager afterwards compares the two versions and compiles a final translated version. The project manager’s task here is to review the two translations and to check for any substantive differences, which then should be checked with the translators to come to a final translation. While the project managers have the final decision, their task is not to make new translations. Rather their aim has to be to compile the best translation using the two versions they received. They need to log their decisions in column h of their sheet.

TRANSLATION ACTIONS AT THE OVERALL LEVEL

The following actions do NOT need to be done by separate translators. One final translation into your respective language(s) suffices:

- The following **standard answer codes**: “Don’t Know (DK), Refusal (Ref) and Not Applicable (NA)”
 - Action: Please translate the three words and copy-paste them throughout in the appropriate column (see below).
- **“Interviewer instructions”**
 - Action: Please translate these and insert translations in the appropriate column (see below).
- **“Glossary”**
 - Action: Please translate and save as ‘EqIs3_glossary_country_[namelanguage].docx.

THINGS THAT DO NOT NEED TO BE TRANSLATED

The translation file also contains things that do not need to be translated:

- **“Data processing” rows**
 - Action: Please ignore any rows marked in red. These are for internal routing purposes.
- **“Scripting language”**

- Action: Please ignore any text marked in green in the translation. This is internal scripting language. However, the project managers will be asked to insert these codes in column H of their translation file.

Responsibilities of the local translators

For each language, the local translators receive either sheet “Translation 1” or sheet “Translation 2” from their project manager.

As noted earlier, all questions identified as “New: translate” and “Modified: translate” will need to be translated by two independent translators. This process can be commenced immediately following the briefing and upon receipt of the documents. The translations need to be inserted into the appropriate column in the translation sheet that the translators will receive from their local project manager.

In addition, one of the two translators should be instructed to translate the:

- The standard answer codes “Don’t Know (DK), Refusal (Ref) and Not Applicable (NA)”
- “Interviewer instructions”

This translator should receive the “Translation 2” sheet, which contains the columns for these two actions.

Responsibilities of the project manager

- Owner of the translation files
- Review of the trend questions
- Adaptation of the “modified: adapt” questions
- Comparing the two local translations and compiling a final version
- Finalising the local translations
- Translation of the glossary

Compilation of the final translated version

As already said, after the two independent translators have done their work, it is the local project manager’s task to compile - for each language – a final translated version.

The first step in the compilation of the final translated version is to copy and paste the translation from translation 1 and the one from translation 2 into the appropriate column on sheet 3.

In reviewing the two versions, it might be that there are differences between the two local translations as these are made independently from each other. It is the project manager’s responsibility to check these differences and to record any meaningful differences into the log

column of sheet 3. In order to decide which version is best, it may be necessary to discuss the differences with the two translators. This as well should be recorded in the log column of sheet 3. The project manager then includes the final translation under the 'final translation' column of sheet 3.

As for the standard answer codes and interviewer instructions made in sheet 2, the project manager should verify these, make any amendments if necessary (which again should be recorded) and include the final version of these two columns in sheet 3.

Back translation

An independent translation agency will then translate all the languages back into English. After this has been done, the central coordination team will review the English back translation against the English master questionnaire. Should there be any discrepancies, we will notify the project managers. They should ask their local translators to recheck the translation and if necessary make any corrections required. This as well should be logged in the translation file.

Timetable

The timetable for the 1st stage of the EQLS translation process is as follows:

Action	Date
Web conference briefing	16 May, 2011
Final translation files	To be submitted on 23 May, 2011
Glossary	To be submitted on 25 May, 2011
Review back-translation	To be submitted on 30 May, 2011

Note for PAPI countries

PAPI countries will also use the translation file. We will provide these countries with all final language versions in Word after the translation process has been completed.

ANNEX 2: TRANSLATION ANNOTATION FILE

Q nr.	Reference; nr are from 2007 EQLS (unless otherwise stated)	Action	Annotation	Comment
HH0	HH0	Modified: translate		
HH1	HH1	Trend: review		
HH2a	HH2a	Trend: review		
HH2b	HH2b	Trend: review		
HH2c	HH2c	Trend: review		
HH2d	HH2d	Trend: review		
HH3a	HH3a	Trend: review		
HH3b	HH3b	Trend: review		
HH3c	HH3c	Trend: review		
HH3d	HH3d	Trend: review		
Q1	Q1	Trend: review		
Q2	New	Translate		
Q3	Q4	Trend: review	Unlimited permanent contract: open-ended contract; Temporary employment agency implies that one is paid through an agency that has arranged the job, that the contract is with the agency and not with the company where one is working; Apprenticeship / training scheme: different from a temporary / fixed term contract in that the aim is to learn a skill	Interviewer instructions modified. Past versus present tense (now present tense)
Q4	Q2	Modified: translate	Please see http://www.ilo.org/public/english/bureau/stat/isco/docs/resol08.pdf . Next to the text of the master questionnaire, national questionnaires may contain other examples that list out the most typical occupations in a given country	New answer categories
Q5	Q3	Modified: translate		New answer categories
Q6	Q5	Modified: adept	Central, regional or local government administration: the state administration proper (at various levels as listed) and includes civil officials and all the employees in institutions or organisations where civil officials work. Other public sector: here we mean institutions/organisations which are fully owned by the state (e.g. schools, hospitals as long as they are not private). Private sector: companies/businesses that are in private hands, not owned by the state: companies/businesses that are in private hands, not owned by the state.	Answer categories have changed

ANNEX 3: EXAMPLE TRANSLATION FILE

A	B	C	H	O	P
Question	Reference 2007	Action	PILOT ENGLISH MASTER	Comments Eurofound	PILOT France_FRENCH
HH2d	HH2d	Trend: review	unable to work due to long-term illness or disability		En incapacité de travailler en raison d'une longue maladie ou d'un handicap
HH2d	HH2d	Trend: review	retired		Retraité
HH2d	HH2d	Trend: review	full time homemaker/ responsible for ordinary shopping and looking after the home		Homme/ femme au foyer
HH2d	HH2d	Trend: review	in education (at school, university, etc.) / student	Etudiant(e) MODIFIED	Lycéen/ étudiant/écolier
HH2d	HH2d	Trend: review	other		Autre situation
dataprocessing	dataprocessing	dataprocessing	HH3LOOP:HH3LOOP		
HH3a	HH3a	Trend: review	HH3A:<U>??HH3LOOP??</U></S TRONG> (INT.: START WITH THE OLDEST MEMBER OF THE HOUSEHOLD.) Now thinking about the other members of your household, starting with the oldest ... Could you tell me whether ??HH3LOOP?? is a male or a female?		HH3A:<U>??HH3LOOP??</U></S TRONG> (ENQ. : commencer par la personne la plus âgée du ménage) Parlons maintenant des autres membres du foyer, en commençant par la personne la plus âgée. Pouvez-vous me dire s'il s'agit d'un homme ou d'une femme ?
HH3a	HH3a	Trend: review	Male		Homme
HH3a	HH3a	Trend: review	Female		Femme
HH3b	HH3b	Trend: review	HH3B:<U>??HH3LOOP??</U></S TRONG> What was this person's age last birthday?		HH3B:<U>??HH3LOOP??</U></S TRONG> Quel était l'âge de cette personne à son dernier anniversaire ?
HH3c	HH3c	Trend: review	HH3C:<U>??HH3LOOP??</U></S TRONG> (INT.: SHOW CARD C) What is this person's relationship to you? Is he/she your ...?		HH3C:<U>??HH3LOOP??</U></S TRONG> (TENDRE LISTE REPONSE C) Quelle est la nature de la relation entre cette personne et vous ? Est-il / elle votre ... ?
HH3c	HH3c	Trend: review	spouse/partner		Epoux(se) / compagnon ou compagne
HH3c	HH3c	Trend: review	son/daughter		Fils/ fille
HH3c	HH3c	Trend: review	parent, step-parent or parent in law		Parent, conjoint de l'un des parents ou parent par alliance
HH3c	HH3c	Trend: review	daughter or son in law		Belle-fille ou gendre
HH3c	HH3c	Trend: review	grandchild		Petit-fils / Petite-fille
HH3c	HH3c	Trend: review	brother/sister (incl. half and step siblings)		Frère / soeur (demi-frère / demi-soeur et frère / soeur du conjoint inclus)
HH3c	HH3c	Trend: review	other relative		Autre membre de la famille
HH3c	HH3c	Trend: review	other non relative		Autre proche non membre de la famille
HH3d	HH3d	Trend: review	HH3D:<U>??HH3LOOP??</U></S TRONG> (INT.: SHOW CARD D) Which of these best describes his/her situation?		HH3D:<U>??HH3LOOP??</U></S TRONG> (TENDRE LISTE REPONSE D) Parmi ces situations, laquelle décrit le mieux celle de cette personne ?
HH3d	HH3d	Trend: review	at work as employee or employer/self-employed		Actif en tant que salarié ou employeur/travailleur indépendant
HH3d	HH3d	Trend: review	employed, on child-care leave or other leave		Salarié en congé parental ou autre congé
HH3d	HH3d	Trend: review	at work as relative assisting on family farm or business	(sans percevoir de salaire) is not in the master questionnaire. REMOVED IN FRENCH AS WELL	Actif en tant que membre de la famille participant à l'exploitation agricole ou au commerce
HH3d	HH3d	Trend: review	unemployed less than 12 months		Au chômage depuis moins de 12 mois
HH3d	HH3d	Trend: review	unemployed 12 months or more		Au chômage depuis 12 mois ou plus
HH3d	HH3d	Trend: review	unable to work due to long-term illness or disability		En incapacité de travailler en raison d'une longue maladie ou d'un handicap
HH3d	HH3d	Trend: review	retired		Retraité
HH3d	HH3d	Trend: review	full time homemaker/ responsible for ordinary shopping and looking after the home		Homme/ femme au foyer

ANNEX 4: PILOT REVISION SHEET

GfK Programming Revision Sheet - EQLS3 Pilot Local Qre - Requested revisions to be taken into account POST PILOT						
Study Name/Project number: EQLS3 7347 - Pilot phase						
Research contact: EQLS team						
			Scripting team at GfK Belgium			Agency
Date	Question number	Requested Revision	Type of revision	Corrected (Y/N). If no, mention reason	Revision corrected by (insert name)	Date corrected
					Correction checked/re tested by (insert name)	Comments
	Q2	It's very confusing that Q2 asks about respondent immediately after a question about partner's employment status	content			
	Q3	Some people work in more than one place and it can has different characteristics. Maybe it should be multi-answer or add "your main job"? Same goes for Q13	content			
	Q4/Q5	According the instruction in the questionnaire text "RECORD 98 FOR "DON'T KNOW", 99 FOR "REFUSED", however these options should be entered under codes 12 for "don't know" and 13 for "refusal"	instruction/structure			For the pilot phase the interviewers where instructed how to indicate "don't know" or "refusal" regardless of numbering.
	Q4/Q5	Very long text on screen, which makes it difficult to have a nice lay-out	lay-out			Suggestion : show on screen only the category headers and show the examples on the showcard ?
	Q5	Missing options "Don't know" and "Refusal" in master and local script; also missing in excel translation file (correct in English word master).	structure			
	Q32/33/34	Can we really not avoid repeating children or parents if they've already told us at Q33 that they don't have any?	structure/filter			The filter is : IF Q33a = 6 (don't have such relatives), OMIT Q34a; IF Q33b = 6, OMIT Q34b; IF Q33c = 6, OMIT Q34c. There is no filter on Q32 (was decided as such in the pilot master).
	Q33/Q34 item on friends or neighbours	Although we are talking about friends or neighbours the instruction about children appears again (INT.: IF SEVERAL CHILDREN THEN ANSWER FOR THE ONE WITH WHICH THE RESPONDENT HAS THE MOST CONTACT). Shouldn't it be removed from this question item? May be confusing that 'Any of your friends or neighbours' includes instruction relating to children	content			
	Q34 first three items	Items in different order on screen at Q34 though correct order for those same items at Q33, and correct order for both questions in the excel translation file.	structure			Check with Askia ("label wissel"). For the pilot, the datapunchers were instructed to pay special attention to this question as to enter the right

ANNEX 5: TRANSLATION FILE MASTER FIELD PHASE

Question number 2011	Reference 2007	Action	PILOT ENGLISH MASTER	FINAL ENGLISH MASTER	New instructions
HH3c	HH3c	Trend: review	spouse/partner	spouse/partner	
HH3c	HH3c	Trend: review	son/daughter	(step-)son/(step-)daughter	
HH3c	HH3c	Trend: review	parent, step-parent or parent in law	parent, step-parent or parent in law	
HH3c	HH3c	Trend: review	daughter or son in law	daughter-in-law or son-in-law	
HH3c	HH3c	Trend: review	grandchild	grandchild	
HH3c	HH3c	Trend: review	brother/sister (incl. half and step siblings)	brother/sister (incl. half and step siblings)	
HH3c	HH3c	Trend: review	other relative	other relative (grandparents, aunts and uncles, etc.)	
HH3c	HH3c	Trend: review	other non relative	other non relative	
HH3d	HH3d	Trend: review	HH3D:<U>??HH3LOOP??</U> [INT.: SHOW CARD D] Which of these best describes his/her situation?	HH3D:<U>??HH3LOOP??</U> [INT.: SHOW CARD D] Which of these best describes his/her situation?	
HH3d	HH3d	Trend: review	at work as employee or employer/self-employed	at work as employee or employer/self-employed	
HH3d	HH3d	Trend: review	employed, on child-care leave or other leave	employed, on child-care leave or other leave	
HH3d	HH3d	Trend: review	at work as relative assisting on family farm or business	at work as relative assisting on family farm or business	
HH3d	HH3d	Trend: review	unemployed less than 12 months	unemployed less than 12 months	
HH3d	HH3d	Trend: review	unemployed 12 months or more	unemployed 12 months or more	
HH3d	HH3d	Trend: review	unable to work due to long-term illness or disability	unable to work due to long-term illness or disability	
HH3d	HH3d	Trend: review	retired	retired	
HH3d	HH3d	Trend: review	full time homemaker/ responsible for ordinary shopping and looking after the home	full time homemaker/ responsible for ordinary shopping and looking after the home	
HH3d	HH3d	Trend: review	in education (at school, university, etc.) / student	in education (at school, university, etc.) / student	
HH3d	HH3d	Trend: review	other	other	
HH3d	HH3d	New: Translate		child under 14 (NOT ASKED/NOT ON CARD)	Not asked by interviewer - automatic code in CAPI; interviewer instruction in PAPI; If child is under 14, use code

ANNEX 6: GLOSSARY MASTER FIELD PHASE

EQLS 2011 – Final Glossary (English master) FINAL VERSION - 18 AUGUST 2011

Highlighted in blue: modifications to 07-07-2011 version

Highlighted in blue with strikethrough: text has been deleted from 07-07-2011 version

Household grid

GLOSSARY HH1

This question asks for the total number of people in the household (**including** children).

You will have already recorded the number of people aged 18 or older on the **contact form** to select the respondent.

If you should discover at this stage that you have been given the wrong information for the contact form selection:

- Do NOT change the contact form or redo the selection procedure
- DO record the **correct information at HH1**
- MAKE a note of what happened beside the household grid.

Remember: a **household** comprises one person living alone or a group of people living at the same address in a non-institutional dwelling, who have that address as their only or main residence, and who either share at least one main meal a day or share the living accommodation (or both).

Please include: people away for less than six months (for example, people on holiday, or away working temporarily).

Please exclude: people away for six months or more (for example, students), or temporary visitors.

GLOSSARY HH3

HH3b Children aged younger than one year old should be coded as '1'.

HH3d This question establishes the 'economic statuses of all household members.

In case of a few statuses that may apply, respondent should be asked to choose the main (principal) one.

Some more information about the categories is provided below:

1. At work as employee or employer/self-employed

This category includes all types of paid work, whether for an employer, or on the respondent's own account as self-employed.

Please include:

- Casual, part-time and temporary work.
- People absent from work last week because of sickness or injury, holiday or compassionate leave, provided that they have a job to go back to with the same employer or as self-employed in the same field.
- People who were temporarily laid off, or on strike, or locked out, again provided that they have a job with the same employer to go back to, or to the same self-employed status.
- People whose contract of employment incorporates regular but intermittent work (e.g. some staff in educational institutions, or professional sportsmen, whose wages are paid only during term-time or in the season, and who therefore may not have worked last week).
- Someone who owns a business is considered as self-employed and therefore also belongs to code 1 as long as they are working in this business and not just living off its profits.

Exclude:

- Voluntary work
- Work carried out where only expenses are reimbursed or work paid for in kind (e.g. receiving board and lodgings only) where there is no financial transaction.

2. Employed, on child-care or other leave

This covers people who are temporarily away from their job (for more than a week) because of child-care leave, maternity leave, sabbatical leave, or other leave including sick leave, provided that they have a job to go back to with the same employer or as self-employed in the same field.

3. At work as relative assisting on family farm or family business

This category only includes people who do not receive a formal wage or salary for their work.

4. or 5. Unemployed (less than 12 months & 12 months or more)

This category includes all unemployed people, including those seeking work through central or local government employment services, people registered with private employment agencies, people answering advertisements for work, advertising for work or even people just actively looking around for opportunities. Interviewers may need to probe about the length of unemployment if necessary.

Exclude:

- People on leave from their job and thus have a job to return to (code 2)
- Those who are ill and temporarily unable to look for work (who should be entered as code 6).

6. Unable to work due to long-term illness or disability

This covers people out of work and not seeking work because of permanent (or indefinite) sickness or disability. It includes people who have never worked because of disability. In cases of doubt over whether an illness or disability is permanent, treat it as permanent if it has lasted continuously for six months or more. Do not include retired people in poor health who would not be seeking work even if they were healthy (code 7).

7. Retired from work

This covers people who have retired from their occupation at approximately the normal retirement age or who have taken 'early retirement', and are not seeking further employment of any sort.

Retired people who are permanently sick or have become disabled still count as retired.

Women who leave work to look after the home or to raise a family and who have not worked for many years, should be classified as 'looking after the home' (Code 8) rather than retired. But it is difficult to define retirement exactly. Apart from the proviso made about women, the respondent's description from the card should generally be accepted.

8. Full-time homemaker

This covers anyone more or less wholly involved in unpaid domestic or caring duties.

9. In education (at school, university etc)/ student

Please include:

- All students, even those doing vacation jobs.
- If the student is on vacation and will continue to be a student only if he or she passes an exam, assume that the exam will be passed and still treat the respondent as in fulltime education.

10. Other

This option is not shown on the show card. It covers anyone who does not fit into any of the 9 categories on the card. But remember that people who are in any kind of paid work (including casual self-employed jobs) should not be included here.

Questionnaire

GLOSSARY Q3

Code 1 (On an unlimited permanent contract): A person with a permanent job should be coded as being on an “unlimited permanent contract” (code 1).

Code 4 (On a temporary employment agency contract): Temporary employment agency (code 4) implies that a person is paid through an agency that has arranged the job (thus, the contract is with the agency and not with the company where the work is being done).

Code 5: (On apprenticeship or other training scheme): An apprenticeship / training scheme (code 5) is different from a temporary / fixed term contract in that the aim is to learn a skill.

GLOSSARY Q4/Q5

These questions are about the respondent's **current or most recent job** (if they are currently not working).

They apply to **both those employed and self-employed**.

If the respondent has more than one job you should ask them to think about their '**main**' job. A 'main' job is defined as the job that occupies them for the most hours per week. If they have two jobs that are exactly equal, they should answer about the more highly paid of the two.

Respondents must choose a category themselves. If necessary add: "There is no right or wrong answer. Just choose the category you think fits best".

Examples include occupations for both genders in each category. Notes about particular categories provided below:

Category 10 (Manager):

Small shop owners belong to category 52.

Category 52 (sales workers):

This category includes small shop owners.

Categories 70 (craft and related trades worker) – 80 (plant and machine operator or assembler) - 90 (unskilled worker elementary occupations):

These categories can include non-manual as well as manual work and reflect a skill hierarchy (70=skilled, 80=semi-skilled, 90= unskilled/routine).

Category 00 (armed forces occupation):

This category does not include police which is under Category 50-service worker.

GLOSSARY Q6

This question asks respondents about the 'sector' they work within. Some examples of different sectors follow, although please remember that these may vary from one country to another:

- 1. Central, regional or local government administration:** refers to the state administration proper (at various levels as listed) and includes civil officials and all the employees in institutions or organisations where civil officials work.
- 2. Other Public sector:** refers to public sector employers other than 'Central, regional or local government administration'. Examples of these employers will vary across Europe but may include state-funded schools and hospitals, as well as facility companies, should also include all nationalised industries and public corporations.
- 3. Private sector:** This should include all private sector firms or companies. Self-employed as a rule belong here.
- 4. Other:** Please note that joint private-public (companies which are partly owned by the State and partially in private ownership) and not-for-profit sector (non-governmental organisations that include those who work for charities and other non-profit making bodies) should be marked as Code 4 Other.

GLOSSARY Q8-Q9-Q10

Code 997 (Not applicable) applies to those who cannot work for physical or other reasons.

GLOSSARY Q11

'Social commitments' can mean various commitments that are outside work, not only those related to one's family.

GLOSSARY Q12

If someone is not sure how to answer these questions because he/she does not have a family or does no household jobs, please code him/her as code 5 'Never'.

Family in 'family responsibilities' refers to one's immediate family.

GLOSSARY Q13

Item b (accumulate hours): Being able to use the hours you work overtime for time off.

Item c (I can take my leave days when I want to): Leave days off include paid and unpaid leave.

GLOSSARY Q14

Note that Q14 applies to all who have paid work regardless of whether they have the options listed in Q14 or not. Services may be given in the person's home or in care institutions

Item d: child care includes after-school care; long term care is for dependent people because of old age, chronic illness or disability.

Item e (I can take my leave days when I want to): Leave days off include paid and unpaid leave.

GLOSSARY Q15 –Q16

If the respondent has more than one job you should ask them to think about their 'main' job. A 'main' job is defined as the job that occupies them for the most hours per week. If they have two jobs that are exactly equal, they should answer about the more highly paid of the two.

GLOSSARY Q17

This question is **NOT** only asking about the number of bedrooms in the accommodation. In counting the number of rooms, please follow these rules.

- **Include:** living rooms, dining rooms and bedrooms. Also include studies as long as they are **not only** used for business purposes. So, for instance, if someone has a study at home that he/she uses for work, but other people in the household also use this room (for example, to use a computer), you should include it in your count.
- **Exclude:** kitchens, bathrooms, toilets, hallways, garages, storage rooms, and rooms **only** used for business (for example, a shop, workshop or office).

~~If the kitchen is connected to the living room, it should be counted as one room.~~

What should be done if the accommodation is shared by more than one **HOUSEHOLD**?

Accommodation is defined as the home (for example house, flat, apartment or farm) in which the respondent and his/her family live. So:

- If the respondent lives in a dwelling or house with several apartments, he or she should say how many rooms there are in his/her apartment.
- If there are several families sharing one house, apartment, flat or farm **and together they constitute the same household** (see definition of household at HH1), all rooms in the house would be counted.

GLOSSARY Q18

Codes 1 (own without mortgage) and 2 (own with mortgage) refer to **ownership** of the accommodation:

- At code 1, the property no longer needs to be paid off – it is fully owned by the household.
- At code 2, the ~~respondent household~~ is still paying in order to buy the property. In most countries this will be through a mortgage, but it could be being bought through a loan or credit. Thus the focus of code 2 should be that the respondent is paying in order to own the property.

Please note that this question is about the accommodation in which the **household** resides, rather than being only about the respondent's situation, if this is different. This means:

- If the respondent lives at home with his parents and they own their own home, code 1 or 2 would be used, regardless of whether rent is paid to the parents or not.
- If the respondent lives in property that is owned by family who do not live there and he pays rent to them, **code 3 (tenant, paying rent to private landlord)** should be used. If rent is not paid, **code 5 (accommodation is provided rent free)** should be used.

You may include at **code 4 (tenant, paying rent in social/voluntary/municipal housing)** people living in "**company housing**", the assumption being that the respondent pays rent to his employer.

If the accommodation is provided by the **employer rent free**, please use **code 5 (accommodation is provided rent free)**.

If the respondent is living in **co-operative** housing (which maybe organised privately but is marked by a non-profit approach), **code 4 (tenant, paying rent in social/voluntary/municipal housing)** should be used.

GLOSSARY Q20

This question applies to all respondents, irrespective of whether they own or rent their home. So:

- We are thinking here of people who might leave their accommodation because they can not afford the rent, or cannot afford to keep up their mortgage payments, or other housing related costs.
- There is **NO 'not applicable' code** at this question. If someone has no or very low housing costs (for example, they own their own home or do not pay rent), they should be coded 'quite' or 'very' unlikely to move.
- If someone thinks they will move within the next six months, but **not** because they can no longer afford their home (for example, they are moving because of their job), they should be coded 'quite' or 'very' unlikely to move.

GLOSSARY Q21

Item c (take part in sports or physical exercise): walking is included if it is done for the purpose of exercising.

Item d (participate in social activities of a club, society, or an association not related to your work): refers to activities that are not part of work, but may include social events of professional communities.

Note in general: If the activity is irregular, please ask about the usual practice or the frequency on average.

GLOSSARY Q22

Religious institutions can organise activities that fall under items **a-c** and should be coded accordingly. Any other activities organised through a church, temple, mosque or other religion institution should be considered as 'other' (item 'e').

GLOSSARY Q23

Item a ("Attended a meeting of a trade union, a political party or political action group") : Political action includes national, regional and local or community level.

Item d ("Contacted a politician or public official): By 'public officials' we mean both elected and non-elected public officials, at any level from central to local government.

Please note the instruction to exclude 'routine contact arising from the use of public services'. This means you should:

- **Include:** contact with a public official relating to a respondent's views of government policy or what government should do. Contact with public officials can be included here if it is 'non-routine' – for example, a person writing to an elected official because of problems they are experiencing in their use of public services.

- **Exclude:** 'everyday' contact with public officials about issues relating to public services (for example, contact with officials over routine issues to do with housing, education, reporting crime or claiming welfare benefits).

GLOSSARY Q24

This is a general question. It does not refer to a specific group of people.

GLOSSARY Q26

This question is about the rules that government should put in place regarding people coming into the country to work. It is **not** about asylum seekers or illegal immigrants. Please note that the answer options are not to be read out – you should just show the respondent the card/screen, and record their answer.

GLOSSARY Q28

Some respondents might find it difficult to distinguish between some of these categories:

By 'government' we mean a central executive body within a country. **The master questionnaire uses the word "government", but it can be changed to "central government" or "federal government" or as appropriate.**

By 'parliament' we mean the national legislative body.

'Legal system' refers to the entire system and not to a specific legal entity within the country.

'Press' refers to all printed sources of news information.

If someone is unable to provide an answer to any of these questions, please use the 'don't know' code.

GLOSSARY Q29

Q29g (I don't feel the value of what I do is recognised by others): Attention: This is the only item in Q29 that is formulated negatively. So be careful that the respondent's answer points in the intended direction. Note that "what I do" refers to what people do in the broad sense and not only to their job.

Q29h (Some people look down on me because of my job situation or income): Job situation: refers to unemployed people as well.

GLOSSARY Q33-Q34

Q33 and Q34 concern contact with people outside the household. If someone does not have any of the relatives in question (for example, he or she has no children at 32), or lives with their only children (and thus has no children living outside the household), please use **code 6 (don't have such contacts)**.

Please note that code 6 is not applicable for Q33d or Q34d, for obvious reasons.

Direct face-to-face contact means more than just seeing a person, implies that there is also verbal communication.

GLOSSARY Q35

Emphasize 'if you NEEDED' – i.e. the **hypothetical** situation. This question is aimed at measuring social support network, rather than a need for actual help at that moment.

Answer '3' (A service provider, institution or organisation) can include social worker or any services such as housecleaning, etc. It generally includes anything that does not belong to 1 and 2.

GLOSSARY Q36

If not applicable and a respondent doesn't spend any time on given activities, mark Code 5 (Never). The term 'caring for children' is broad and includes educating and bringing them up. The respondent could be caring for his or her own (step-)children, his/her grandchildren (but not if this was part of a paid job). It excludes paid or volunteer help for children.

GLOSSARY Q37

For those involved in activities for up to one hour per week (e.g. half an hour a week), please code them as "1". If respondent provides the number of hours in decimals (e.g. 2.5 hours) please **round** to the nearest number (e.g. 3 hours).

The respondent could be caring for his or her own (step-)children, his/her grandchildren including step-children and step-grandchildren (but not if this was part of a paid job).

GLOSSARY Q39

There is **NO 'not applicable'** code for **Q39b-d**. If someone does not spend any time on an activity listed, they should be able to answer the question by indicating whether they would like to spend more time or whether they feel they want to maintain the same situation as they currently do (answer '2').

Item 'c' (Own hobbies/ interests) does not include 'social contact' which is being asked about in the previous item 'b' (Other social contact-not family).

GLOSSARY Q43

Any type of long standing illness counts. With regard to the degree of their impact, there is a follow-up question

GLOSSARY Q46

Option 'a' (I have felt particularly tense) includes all types of feeling tense, of psychological or physical nature. It is up to respondent to decide.

GLOSSARY Q50

It is up to the respondent to decide upon the meaning of the term 'immediate neighbourhood'. Item c (Quality of drinking water): "drinking water" applies to tap water to drink rather than bottled water.

GLOSSARY Q53/Q54/Q55/Q56

This question asks about a general view on the listed services in the country.

Childcare: includes all types of childcare.

Long term care: that is services for dependent people because of old age, chronic illness or disability. — including services in the community as well as residential services. Services may be given in the person's home or in care institutions.

GLOSSARY Q59

Item c (Replacing any worn-out furniture): 'Worn-out' means old, broken or torn.

Item f (Having friends or family for a drink or meal at least once a month): We are referring to people (friends, family) coming to the respondent's house for a drink or a meal at least once a month. It does not mean taking friends or family out for dinner in a restaurant.

GLOSSARY Q61

Item c (Pension): Pension includes pre-pension and/or early retirement pay.

GLOSSARY Q63/Q64

At these questions you should obtain the total net income of the household from all sources, that is, after tax. Please bear in mind:

- Income includes not only earnings but state benefits, occupational and other pensions, unearned income such as interest from savings, rent, etc.
- We would like to get figures after deductions of income tax, national insurance, contributory pension payments and so on.
- The questions refer to current level of income or earnings or, if that is convenient, to the nearest tax or other period for which the respondent is able to answer.
- If the respondent will not provide an amount at Q63, Q64 provides a show card that should help them to identify their weekly, monthly or annual income, whichever they find easiest. They will then give you the letter that corresponds to the appropriate amount. This system is designed to reassure the respondent about the confidentiality of the information they are giving.
- If someone cannot or does not want to answer either Q63 or Q64, please use 'don't know' or 'refusal' as appropriate.

GLOSSARY Q67

Citizenship: If unclear to a respondent, ask e.g. if the respondent has a passport of the country he lives in.

In case of multiple citizenship, mark first that applies.

ANNEX 7: CONTACTSHEET MAIN FIELD PHASE

Third European Quality of Life Survey 2011 - Contact Sheet

INTERVIEWER: Hello / good afternoon / good evening, my name is [INTERVIEWER'S NAME] and I am from the research agency [NAME OF NATIONAL AGENCY]. We are conducting an EU-wide survey about how people feel about their quality of life and I would like to ask your help. Your household has been selected at random as part of a representative sample of the [COUNTRY] public and I'd like to ask someone living in the house for their views on a number of different aspects of their life.

Third European Quality of Life Survey 2011 - Contact Sheet

Unique ID number							
Interviewer number							

Note: this Unique id looks like
Country code + 7 digits e.g.
UK9876543

Address Details

Street			N	D U
Postal code	Town/City			

DU = Dwelling Unit Number (apartment/flat/household number) in multi-unit building

Visit records

Note: Visit type: 1 Personal visit, 2 By telephone
a refusal can never be by telephone, 1st visit needs to be a personal visit

24 hour clock has to be filled in e.g.: 19:15

Address details

1 What kind of address is this? ... (Please choose the code that applies)

What kind of address is this? ... (Please choose)	
Farm	1
Detached house	2
Semi-detached house	3
Terraced house	4
Multi-unit building	5

Other type of dwelling	6
Non residential address	7
Address Not Found/ Demolished	8
Vacant property	9
Area inaccessible /dangerous	0

If codes 7, 8, 9 & 10: END WITH THIS CONTACT SHEET and GO TO NEXT ADDRESS (USE A NEW CONTACT SHEET)

Outcome of visits												
2	1st	2nd	3rd	4th	5th	6th	7t h	8t h	9th	10t h	11t h	12t h
Contact	1	1	1	1	1	1	1	1	1	1	1	1
No contact	2	2	2	2	2	2	2	2	2	2	2	2
Upfront refusal	3	3	3	3	3	3	3	3	3	3	3	3
Other language	4	4	4	4	4	4	4	4	4	4	4	4

If code 1 - Contact - go to the "selection of respondent" section

If code 2 - No reply/contact - plan a NEW VISIT

If code 3 - UPFRONT REFUSAL - record the gender of the contact person and move to a NEW ADDRESS (NEW CONTACT SHEET)

If code 4 - Person at the door is not speaking the language - record the gender of the contact person and move to a NEW ADDRESS (NEW CONTACT SHEET)

GEND ER	1st	2nd	3rd	4th	5th	6th	7th	8t h	9t h	10t h	11t h	12 th
Male	1	1	1	1	1	1	1	1	1	1	1	1
Female	2	2	2	2	2	2	2	2	2	2	2	2

Selection of respondent

Note: the definition of a household is:

"A household comprises one person living alone or a group of people living at the same address in a non-institutional dwelling, who have that address as their only or main residence, and who either share at least one main meal a day or share the living accommodation (or both)."

3 Including yourself, how many people aged 18 or over live in this household? (Look at inclusion rules in box below)

<input type="text"/>	<input type="text"/>
----------------------	----------------------

indicate code 0 if no one eligible; then move to NEW ADDRESS (NEW CONTACT SHEET)

INCLUDE: <ul style="list-style-type: none"> • People who normally live at the address but are away for less than 6 months • People away at work for whom this is the main address • Boarders and lodgers 	EXCLUDE: <ul style="list-style-type: none"> • People aged 18+ who live elsewhere due to work • Spouses who are separated and no longer resident • People away for 6 months or more • People resident in country for less than 6 months
--	---

4 Ask for the name (or initial) and birthday of each eligible person aged 18+ in the household. Then select the person who has the next birthday (next birthday rule) as the respondent

Name/Intials	birthday				Gender		Name/Intials	birthday				Gender	
	d	d /	m	m	M	F		d	d /	m	m	M	F
1					1	2	7					1	2
2					1	2	8					1	2
3					1	2	9					1	2
4					1	2	1					1	2
5					1	2	0					1	2
6					1	2	1					1	2
					1	2	1					1	2

5 From the grid above, enter the number of person selected as the respondent

--	--

6 Enter a phone number for the selected respondent (998 = No telephone; 999 = Refusal)

--	--	--	--	--	--	--	--	--	--	--	--	--

Outcome of contacts

7	Contacts											
	1st	2nd	3rd	4th	5th	6t h	7t h	8th	9th	10 th	11t h	12 th
Interview completed	1	1	1	1	1	1	1	1	1	1	1	1

interview not realised because

Partial interview	2	2	2	2	2	2	2	2	2	2	2	2
Fixed an appointment	3	3	3	3	3	3	3	3	3	3	3	3
Selected respondent currently not at home	4	4	4	4	4	4	4	4	4	4	4	4
Selected respondent away for fieldwork period	5	5	5	5	5	5	5	5	5	5	5	5
Selected respondent ill at home/hospital	6	6	6	6	6	6	6	6	6	6	6	6
Refusal by selected respondent	7	7	7	7	7	7	7	7	7	7	7	7
Selected respondent physically or mentally unable	8	8	8	8	8	8	8	8	8	8	8	8
Selected respondent has language difficulty	9	9	9	9	9	9	9	9	9	9	9	9

If codes 1, 2, 5, 6, 7, 8 & 9 END OF CONTACT SHEET and move to NEW ADDRESS

If code 3 : plan a NEW VISIT and note down appointment date/time under "fixed appointment"

If code 4 : plan a NEW VISIT (at least 4 visits, spread over 2 weeks, at least once in a weekend)

Fixed appointment

8	1st visit	2nd visit	3rd visit	4th visit	5th visit	6th visit	7th visit	8th visit																																																																								
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Date (dd/mm/yy)
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9th visit					10th visit					11th visit					12th visit				