

## **Cooperation agreement**

### **between the European Values Study and the World Values Survey Association regarding joint implementation of the Values Surveys in Europe in 2026**

#### **1. Objective**

The object of this agreement is the cooperation between the European Values Study (EVS) and the World Values Survey Association (WVSA) for joint data collection in Europe in 2026. The two research organizations agree to collaborate in carrying out a joint EVS/WVS survey in Europe.

#### **2. Joint Liaison Committee**

EVS and WVSA will remain and act as independent research organizations, but they will coordinate their activities related to planning, organization and implementation of data collection, data cleaning and data release in European countries.

A Joint Liaison Committee (JLC) will ensure regular communication and coordination of common activities between the two organizations. Each group will appoint four representatives as members of the JLC, including the Chair of EVS and the President of WVSA, the secretaries of the EVS and the WVSA, one board member of the EVS and the WVSA, and the Directors (or representatives) of the EVS and the WVSA's Data Archives.

Regular communications will usually be electronic and members of the JLC will be invited to participate in major organizational events, planning meetings, and workshops from 2024 to 2028, and information about any Calls for Papers for any conference panels, seminar events, or academic workshops sharing findings will be disseminated among members of the WVSA and EVS networks, to promote mutual cooperation and understanding.

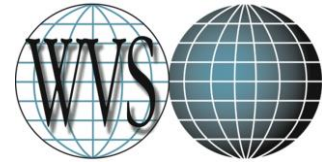
#### **3. Survey schedule**

Both organizations will aim to carry out the joint EVS/WVS survey in Europe during 2026-2027. The joint EVS/WVS survey will take place as a part of the 8<sup>th</sup> wave of the WVS scheduled to take place worldwide in 2024-2026, and the 6<sup>th</sup> wave of the EVS scheduled to take place in Europe in 2026-2028.

#### **4. Principles of cooperation**

Acknowledging the added value of the EVS/WVS joint surveys and datasets for the data users, and realizing the advantages for the research teams in both networks, the following key principles of the future cooperation are proposed:

- To maximize the benefits for the data-users, the EVS and the WVSA shall aim at and explore jointly how to:



- Expand the geographical coverage of EVS and WVS surveys in Europe.
  - Increase the joint core questionnaire (overlapping variables) to be surveyed by the EVS and the WVSA in Europe.
  - Facilitate harmonization of the socioeconomic and demographic variables.
  - Increase the amount of survey data by allowing split sample models (or conducting two non-conflicting timewise and funding-wise surveys) in Europe where possible.
  - Facilitate cooperation on data cleaning and publication of joint dataset and related deliverables.
- To maximize the efficiency of cooperation for the survey teams, the EVS and the WVSA shall aim at and explore jointly how to:
- Ensure regular, smooth communication and information exchange between the EVS and WVSA teams in countries where EVS and WVS have different National Program Directors/ Principal Investigators.
  - Avoid open competition over funding in the same country by introducing coordination of fundraising effort, altering the surveys timing or introducing mediation between the Principal Investigators (PIs) if necessary.
  - Ensure proper acknowledgement of all invested efforts from both EVS and WVSA, and presentation of the surveys conducted within the framework of this agreement as “joint EVS/WVS surveys in Europe”.

## **5. Survey planning and organization**

In Europe, central coordination of data collection will be run by the EVS coordination team. All EVS national teams in Europe will report directly to the EVS central coordination team during the data collection phase and are expected to conform to the guidelines provided by this team.

In the rest of the world central coordination of data collection will be run by the WVS coordination team. All WVS national teams in the rest of the world will report directly to the WVS central coordination team during the data collection phase and are expected to follow the instructions received from this team.

Several WVS national teams in European countries shall coordinate their activities with the EVS counter-partner directly with the EVS PI or via the JLC. WVS national teams in Europe remain subordinated to the Executive Committee of the WVSA and will report to the WVS coordination team.

The JLC will ensure the coordination between data collection in Europe and the rest of the world and will cooperate as equal partners in the following activities:

- Preparation and submission of joint funding applications in countries where EVS and WVS have different National Program Directors/ Principal Investigators.
- Discussion and consultancy regarding sampling, sampling design, applied methodological guidelines, questionnaire translation, etc., subject to the minimum standards set out by the EVS.
- Jointly approve the wording and order of the items in the common core of the questionnaire.
- Transparency of all procedures and regular information exchange.
- Joint data collection of EVS and WVS national teams in those countries where the two organizations have separate PIs, while these PIs retain their status within the EVS and WVS, respectively.
- Cooperative resolution of any conflicts or disputes arising in this process.

## **6. Geographical coverage of the joint survey**

EVS will be primary responsible for planning and where possible conducting surveys in all European countries, using the EVS questionnaire and EVS methodological guidelines.

WVSA will be primary responsible for planning and where possible conducting surveys in all other countries in the world outside Europe, using the WVS questionnaire and WVS methodological guidelines.

## **7. Survey Questionnaire: Common Core and Separate Parts**

It is expected that, similar to the previous waves, the two questionnaires will consist of joint items that are common to both and unique items that are specific to either the EVS or WVS questionnaire.

The joint items define the Common Core of both questionnaires, while the unique items constitute the Separate Parts of the EVS and WVS questionnaires. Under the premises of this agreement, it is in the interest of both the EVS and WVS to take all meaningful efforts to maximize the Common Core relative to the Separate Parts.

The Common Core will be agreed upon by the end of October 2023.

In addition, the EVS questionnaire will include a Separate Part of unique items that are not used by the WVS. Analogously, the unique items of the WVS's Separate Part will be fielded only in the other parts of the world.

Amid the differences in the wave timelines, the WVS will have the WVS-8 questionnaire ready in late 2023; the EVS will have their questionnaire ready in 2025.

## **8. Split-sample model and other cooperation modes**

The EVS and the WVSA shall advise their national survey teams that, if feasible, the split-sample model shall be used as alternative to the standard EVS and WVS sampling plans. Split-sample model presumes that half of the cases are surveyed using the full EVS questionnaire, and the second half of the sample – using the full WVS questionnaire. Both halves of the sample are expected to be representative of the adult national population of the country, with the minimum size of sub-sample of N=1200 cases. If the split-sample model is employed, the two surveys shall take place in the same time period in 2026-2027. Consequently, the common core would be administered to the full sample, with the unique EVS items used for one half of the sample and the unique WVS items used for the other half.

The final decision regarding the model of data collection will be made at the national level. The sample size and model's implementation are subject of negotiation between each country and the coordination team in Europe, depending on the local conditions (such as funding available, modes of data collections etc.), and should comply with the methodological guidelines of EVS. In case that application of the split-sample model is not possible due to one or another reason, full EVS questionnaire should be surveyed in the country.

In countries where the EVS and WVS have different PIs, the two teams shall be encouraged to merge their efforts and employ the split-sample model. In case, application of such model is not possible, and the two teams give strong preference to conducting two independent surveys, the following rules should be observed:

- EVS and WVS surveys within one European country should not overlap in time.
- EVS and WVS teams within one European country should not apply to the same funding agency within the 3-years period (2025-2027). EVS team has a priority to submit their funding application to the public funding sources such as the national science foundation, ministry of science (or equivalent).
- EVS and WVS teams within one European country should engage into regular communication and information exchange to ensure both survey projects go smoothly and timely.

## **9. National teams**

The person responsible for the survey in a particular country is referred to variously as the 'principal investigator' (PI), 'national programme director', or 'institutional partner'. The term 'PI' (which can be a person or organization) will be used in this section.

In cases where the EVS and WVSA have different PIs in a country, they will be encouraged by both EVS and WVSA to work together and to undertake joint efforts to secure funding for the 2026-2027 survey in their country.

In European countries in which both organizations have active PIs, the PIs are encouraged to build a team in order to jointly undertake all activities required, including fundraising and data collection according to EVS methodology and using EVS questionnaire.

Both parties will retain their status as PIs in their respective organizations, including for the organization's decision-making bodies, and they will be recognized by both organizations as joint PIs for the research conducted in 2026-2027.

At the time of writing, countries having PIs from different institutions for the EVS and the WVSA are Armenia, Cyprus, Czechia, Germany, Greece, Netherlands, Slovakia, Spain and Sweden.

Only the EVS General Assembly has the right to decide the membership for the European Values Study. Likewise, only the WVS Executive Committee has the right to nominate PIs for the World Values Survey.

### **10. Data exchange, cleaning, archiving, integration, embargo**

The data dissemination policies of both groups are directed towards easy reuse and transparency on methods. Still, agreements on the dissemination of any joint files should honour existing differences with regard to embargo spells and obligations versus funders.

Both groups start by producing separate cross-national files for data from the world regions under their respective responsibility, following the timing that is best for each group on the background of their data collection and preparation processes.

For any joint files, property rights will be fairly shared and parallel dissemination of identical copies will be carefully organized, to allow for maximal consistency and reproducibility of published results using data from either source.

The best combination of quick releases and ease of use can be achieved by producing three different cross-sectional datasets relating to EVS 2026-2028 and WVS 2024-2026:

- EVS 2026-2028 will include all European countries and all data (questions/variables) collected using the EVS questionnaire.
- WVS 2024-2026 will include only non-European countries and all data (questions/variables) collected using the WVS questionnaire.
- EVS+WVS 2024-2028 will include the core common items and the socio-demographic variables collected in all European and non-European countries.

The EVS archive will be responsible for data archiving and data cleaning of the European surveys.

The WVS archive will be responsible for data archiving and data cleaning for the non-European surveys and surveys conducted in selected European countries by the WVS PIs, should that be the case.

### *10.1. Data producers and distributors*

GESIS is producer of EVS 2026-2028 and EVS longitudinal file and has right of distributing the EVS+WVS 2024-2028 dataset (thereby, any joint EVS+WVS files will be automatically fed into the CESSDA network systems).

JD Systems (JDS) is producer of WVS 2024-2026 and the WVS longitudinal file and has right of distributing the EVS+WVS 2024-2028 dataset via the WVSA official website.

GESIS and JDS will jointly produce, and both distribute any joint EVS+WVS longitudinal file(s) (referred to as the “Integrated Values Surveys” or IVS). They will in due time agree on an efficient and reliable process for the dataset’s production, publication and distribution through both channels, as well as updates.

Similar to the previous rounds of cooperation, both groups will develop standard format for citation of any joint data sets, the usage of persistent identifiers for them, the exchange of user statistics, etc.

### *10.2. Common dictionary*

A common dictionary for any joint EVS+WVS files shall be explicitly and bindingly agreed upon in advance, i.e. even before the first release of any independent EVS or WVS datasets. Both EVS and WVS are free to use or not to use this dictionary for their independent releases.

### *10.3. Property rights*

EVS partners have property right of national data from their countries, except for the obligation to provide it for the integration to the cross-national EVS file.

EVS has property right of the cross-national dataset EVS 2026-2028 and EVS longitudinal file.

WVSA has property right of cross-national dataset WVS 2024-2026 and WVS longitudinal file.

EVS and WVSA jointly hold property rights of EVS+WVS 2024-2028 and of EVS+WVS longitudinal file.

### *10.4. Embargos, data release schedules, updates*

According to the current policy EVS data, including EVS 2026-2028, will be publicly released when it is ready for use with sufficient quality. EVS has no embargo policy on data and all European partners will be obliged to comply with this rule for their contribution to the cross-national EVS file.

WVS is free to follow any own embargo rules. As the joint cross-section file and joint longitudinal file are always produced after the independent EVS- and WVS files, any embargos will automatically be honoured in the joint files.

Joint EVS-WVS files and updates to these will be produced and simultaneously released following an agreed, pre-determined schedule.

Data must be available for both the EVS and WVS group at the very same time, just after fieldwork and archival data cleaning.

**11. Future collaboration**

This agreement applies to the 2026 round of data collection and does not bind the organizations to collaboration on subsequent surveys or other activities. Both organizations believe, however, that mutual understanding and cooperation will help to advance their shared mission of promoting research on values.

To build cooperation and understanding, the JLC will explore opportunities for common future activities of mutual interests linking all members of the EVS and WVS communities, such as considering organizing joint panels, conferences and workshops, outreach, reports, publications, and publicity.

The core terms of this agreement will be widely publicized, including through posting on the WVS and EVS websites, and communicated to PIs, potential donors, and the user community through newsletters and social media outlets.

In witness of the terms of this Agreement concluded on July 10, 2023, signatures of the following authorized representatives of the Parties are affixed:

**European Values Study**

**World Values Survey Association**

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Prof. Ruud Luijkx  
Chair of the EVS Executive Committee

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Prof. Christian W Haerper  
President of WVSA

September 20, 2023

September 20, 2023

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Dr. Vera Lomazzi  
Secretary of the EVS Executive Committee

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Dr. Kseniya Kizilova  
Head of WVSA Secretariat

September 20, 2023

September 20, 2023