The European Landscape of Qualitative Social Research Archives: Methodological and Practical Issues

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Abstract: In this article I set about describing current practices in archiving and reusing qualitative data. I discuss where can you find archived sources of qualitative data, and discuss some of the debates surrounding methodological, ethical and theoretical considerations relating to re-using data. I then address more pragmatic issues involved acquiring, preserving, providing access to and supporting the use of the data. Where best do qualitative data collections sit—in traditional libraries or archives alongside historical documents or as part of more holistic digital collections of contemporary social science research resources? This question relates to accessibility, resource discovery and cataloging methods, data preparation and documentation and promotional and outreach efforts to encourage data use.

The ESDS Qualidata unit at the UK Data Archive is used as case study for showcasing archival practices, and is situated within the broader European landscape of social science-oriented data archives. Infrastructure requirements for running an archive are discussed and a look forward future developments.

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1. Introduction

Archived qualitative data are a rich and unique, yet too often unexploited, source of research material. Qualitative data are collected across a range of social science disciplines and typically aim to capture lived experiences of the social world and the meanings people give these experiences from their own perspectives. They offer information that can be reanalyzed, reworked, and compared with contemporary data and will become historically-rich research materials. While there is a well-established tradition in the social sciences for secondary analysis of survey data, there is still not yet a taken-for-granted research culture, for sharing and reusing qualitative data. [1]

An increasing number of archived sources of qualitative data can now be found, and in the literature it is read about some of the methodological, ethical and theoretical considerations relating to re-using data. There are multiple models of providing access to data. Where would we expect to find qualitative data—in historically rich paper-based archives or as digital social science research resources available via the internet? What methods of access, description, preparation and promotional and outreach efforts best work to expose data and encourage use of data. [2]

ESDS Qualidata, based at the UK Data Archive has been in existence for over 16 years and provides a good model to tell the story of setting up an archiving infrastructure and archival practices for qualitative data. Efforts on the archiving front are happening in other European countries, but progress to a stable or mature data service is often hampered by funding. This paper looks at some of the basic infrastructure requirements for running a successful archive and takes a look forward to future developments. [3]

2. Defining Qualitative Data

For the sake of a simple definition of "qualitative" any research material that is collected from studying people can be included, before it has been transformed into numerical values (e.g. in a spread sheet, database or statistical software), in which case it becomes "quantitative." [4]

In the qualitative approach, a researcher typically uses a diversity of methods and tools to investigate their research questions. The types of data collected vary with the aims of the study and the nature of the sample. Samples are usually small, but can rise to hundreds of participants. Data might include in-depth interviews, semi-structured interviews, focus groups, field notes and research diaries, observational data, diaries, records of meetings, open-ended survey questions or ephemera. Therefore, any one study may yield a wide range of data types for archiving. Moreover most of these types of data may be created in a variety of formats: digital, paper (typed and hand-written), audio, video and photographic. Increasingly data are now "born digital" data in the sense that the text is word-processed, and audio recordings are collected and stored, say, as MP3 files. [5]

The richness of qualitative data is often rarely fully exploited leaving untapped treasures for researchers and students to explore and offering fascinating and otherwise inaccessible accounts of the past and present to engage with. The scope and format of data typically may determine the potential for reuse. For example, data from a research study that collected, recorded and transcribed a hundred or so in-depth interviews and documented detailed field notes, particularly when based on a clear sampling strategy, are much more likely to be useful than a small focused set of interview notes from twenty or so brief semi-structured interviews. The latter set have more limited re-use value as the final publications will usually have "mined" the limited data quite thoroughly, offering less new use value. But as with many archived sources, sometimes the most exciting discoveries arise from re-examining material which hitherto has not been thought worth researchers' attention. David ZEITLYN (2000) argues that field photographs and audio-visual material are probably among the most prolific and least exploited resources produced by anthropologists. [6]

3. Ways of Re-Using Data

CORTI and THOMPSON (2004) have proposed six ways in which data can be reused. These are described below. [7]

3.1 Description and context

The possibilities for using data descriptively are extensive—pictures of contemporary and historical attitudes and behavior of individuals, groups and organizations, or societies can be gleaned. Indeed, significant data created now will in time become a potential historical resource. [8]

Oral testimony complements official, public and press sources, and such evidence can also be used to document individual lives from a biographical perspective, including those of significant researchers themselves. SHERIDAN (2000) notes how the material from the UK's Mass Observation has been used not only to provide historical evidence, but also to examine the role of the Mass Observation study itself in the social, political and cultural milieu of the 1930s and 1940s. And from the 1960s into the 1970s, sociology was not only an exceptionally popular subject with students, and was given more national research resources than at any time before. This enabled social researchers to carry out studies of a significant scale. The legacy of this research is rich descriptive material from those times. [9]

ROPER (2009) researched how young civilian soldiers survived trench warfare on the Western Front by drawing on the emotional and practical support of their families using the original and Paul THOMPSON's own book from the project, "The Edwardians" (1975). [10]

Re-use of these materials requires the new investigator to first evaluate the evidence, examine its provenance, and assess the veracity of the sources. This may be a new practice for contemporary social researchers (KYNASTON, 2005).

But original context is hard to capture, and this is one of the major arguments voiced against re-use of others' data. This point and attempts to remedy the problem is further elaborated later. [11]

3.2 Comparative research, restudy or follow-up

Data can be compared with other data sources or be used to provide comparison with other contexts, over other periods of time, and across other social groups and cultures. In Britain the original returns of the population census were kept as public records and have proved an invaluable basis for consultation in recent years. Sidney and Beatrice WEBB (1920 [1894]), on completing their pioneering study of British trade unionism, archived their field notes from their national sample of interviews, which still feature as the principal source of information on trade unionism in the late 19th century. Equally well known early classic restudies include Seebohm ROWNTREE's (1901) repeated surveys of poverty in York and Hubert LLEWELLYN SMITH's (1930-1935) repeat of Charles BOOTH's (1891-1902) poverty survey in London. [12]

Comparison brings greater power to answer research questions, for example when data can be combined with data beyond its own sample or geographical limitations. Glen ELDER's "Children of the Great Depression" (1974), is based on both new fieldwork and a reorganization of the earlier interviews and participant observation of the Berkeley and Oakland cohorts interviewed on a regular basis since the 1920s, archived by the Murray Research Centre. Follow-up studies will usually require approval from a research ethics committee to re-contact original participants. In addition, particularly in the health field, original investigators are often keen to become collaborators in follow-up studies, rather than just being cited as the original data collectors (CORTI & WRIGHT, 2002). [13]

In a more recent example, the Living and Working on Sheppey project explores the recent history and changes in working lives in Sheppey in this and the last century. The project, funded through a communities program, is a combination of new research and re-use of Ray PAHL's earlier data (2005). This part of the project replicates young school leavers writing similar essays in broadly similar conditions of economic recession. The project had coded up original essays from 1974 and is comparing and contrasting these against the new essays to look at school leavers' imagined futures. [14]

3.3 Re-analysis or "secondary analysis"

Reanalyzing qualitative data allows both for re-interpretations and also for new questions to be asked of the data. CHARLESWORTH and FINK (2001) draw upon original research data from Peter TOWNSEND's study of institutional care published as "The Last Refuge" (1962), to illustrate the potential which this archived data holds for the analysis of such topics related to workplace and organizational dynamics. Alternatively, new angles can be applied and new methods employed which may not have been possible at the time of the original data analysis. Sometimes new analytical tools can highlight parts of data that

were previously ignored in the original analysis, offering the chance to revisit and reanalyze material, even if already written up (AKERSTRÖM, JACOBSSON & WÄSTERFORS, 2004). Typically, the richer the original research material, the more potential there is for further exploitation. [15]

Nigel FIELDING and Jane FIELDING (2000) revisited Stan COHEN and Laurie TAYLOR's (1972) original analysis of long-term imprisonment of men in maximum security, published as "Psychological Survival." Their restudy highlights the value of secondary analysis in addressing sensitive topics or hard to reach populations, by extracting the maximum value from those studies which are able to negotiate access. [16]

Libby BISHOP (2007) used two historical qualitative data collections from the 1970s to examine attitudes and practices about early forms of processed foods and about sociality and food choices at meals. The study focused on the need to problematize concepts of convenience and choice by exploring the beliefs and practices from which current uses of convenience food may have emerged. [17]

Re-analysis does not usually involve attempts to undermine researcher's previous analysis. [18]

3.4 Research design and methodological advancement

A study of the research methods of an original research investigation, such as the sampling methods, data collection and fieldwork strategies and interview guides of earlier research can help in the design of a new study or the development of a methodology or research tool. Paul THOMPSON reflects on the role of drawing on existing interview guides designed by earlier researchers in a similar field (SAVAGE, 2005; CORTI & THOMPSON, 2004; THOMPSON, 2000a). [19]

While a discussion of methodology is normally published in research findings, all too often the details offered are frustratingly brief and sanitized. Researchers' own fieldwork diaries or analytic notes can offer much insight into the history and development of the research and can help inform new thinking. Peter TOWNSEND's in-depth investigation into the nature and status of older people's institutions in post-war Britain, "The Last Refuge" (1962) was considered a pioneering piece of research when it was published in 1957. It attracted much publicity for its focus on an important and neglected area of policy, and also for its methodology and its policy recommendations. The meticulously preserved fieldwork descriptions of old people's institutions, and accompanying interviews, provide a glimpse behind the final polished policy reports—exposing how the researcher approached the study and the methods he used. [20]

Capturing the methodological perspectives and details under which studies are undertaken (across all stages) provides added value for a secondary user who may be unfamiliar with the raw data. I discuss capturing "context" later. [21]

3.5 Replication or validation of published work

Archived data can be scrutinized with scientific rigor to support or challenge a set of findings or to appraise the method. The practice of opening data for inspection is becoming increasingly important in the natural sciences, with the aim of encouraging more transparent research. An example is master classes on verification in the field of quantitative economics, the *Replication Workshop— Estimating Time-Series-Cross-Section Models with Comparative Political Economy Data* (ESRC Oxford Spring School). This was part of a national training initiative to improve the standards of research methods across the UK social science (ESRC, 2005). [22]

Martin HAMMERSLEY (1997) discusses the benefits and weaknesses of using "replication" to check findings, arguing that true scientific replication is not possible as studies generally do not have equal social phenomena. Restudies suffer from differences in time and the researchers' subjective perspectives, but well-documented data sets can help the new investigator to reconstruct the evidence by re-tracing the original analytic steps. HAMMERSLEY and others correctly argue that replication is not an appropriate objective for secondary analysis, partly because of the problem of context. The loss of the holistic context of a study means that it is unlikely that the research process could ever be made fully explicit—the path of qualitative analysis is never linear, and almost always involves a degree of trial and error in the pursuit of interesting lines of investigation. Retaining original coding frames and analytic notes means that these could be reapplied by another investigator. Nigel FIELDING and Jane FIELDING (2000) further suggest that qualitative software may help the process of verification. [23]

3.6 Learning and teaching

The use of real-life data in teaching substantive or methodological perspectives in the social sciences adds interest and relevance to courses. Data can be chosen to be of particular relevance to the subject being taught and thus can bring both substantive and methodological topics alive. Students can learn many fundamental aspects of qualitative research, and the theoretical and methodological strategies that helped to create chosen data outputs, while also gaining first-hand experience of critically re-analyzing and comparing data from well-known sources. Having already-collected data to hand can free up time from students having to collect their own data, and instead focusing on the vital skills that sit either side of that process—formulating research questions and analyzing data. [24]

Learning about the work of researchers who have made a significant impact in their field allows young researchers to take the best practice elements from this work and further develop them in their own research work. [25]

Examples of using qualitative data in teaching and learning are discussed by CORTI and BISHOP (2005). ESDS Qualidata provides a well-used teaching

resource on exploring diverse interview types and provides examples of how other teachers have used data in their teaching (ESDS QUALIDATA, 2009). [26]

4. Challenges in Re-Using Data

There are different and perhaps more challenging intellectual, epistemological and practical problems for the user to consider compared to confronting numeric data, although re-use of any dataset collected by a third party can be beset with complexity. [27]

In discussing some of the issues directly with qualitative researchers over the past 15 years, it appears that the concerns are by no means homogenous. The barriers span unfamiliarity with the methods and lack of guidance; lack of infrastructure for data-sharing and data discovery; misinterpretation of data; and threat to intellectual property rights and personal knowledge capital. [28]

I have identified six key main perceived barriers and some hopeful remedies (CORTI & THOMPSON, 2004):

1. The practice of secondary analysis of qualitative data is still not yet a common place research activity. Progress is also hindered by preconceptions and sometimes less than innovative approaches to qualitative research. A cultural shift is required and I believe that this has been progressively happening since the mid 1990s. The literature is improving as you can see from the list of references I have provided in this article, and it will continue to do so as making use of existing resources will become more necessary in future climates of austerity.

2. There are arguments concerning the implicit nature of qualitative data collection and analysis, of the re-user not being to experience the full context and appreciate the reflexivity in the original research process. Some claim that they could never fully engage with research materials created by someone else because of the irreparable "loss" of these experiences. However, there are many instances where researchers have to do with using evidence collected with them not "being there." In team research data and fieldwork experiences are commonly shared, and many Principal Investigators of large projects who remain one step away from the field it is imperative they rely on their research staff on the ground to capture, document and communicate the nuances of the research process.

   It is vital to capture better and more systematically the context and the interrelationships among data and between data and other academic products, like analyses and write ups. Historians use older sources as a matter of course and are happy to establish the veracity first. Why can't sociologists?! Context can be provided at many levels: interaction through audio-visual record and full transcription; the setting through descriptions of observations; the research itself through providing retrospective details of methods, sampling, analysis and relevant macro-level details (such as period or events). An interview with the original investigator can help gain an overall

flavor of why and how project was conceived and undertaken. Much work has been done to assess the issue of context and provenance in the few years (CORTI, 2006; VAN DEN BERG, 2005).

3. Re-using data requires time to get fully acquainted with research materials created by someone else. The time required to fully acquaint oneself with new materials can be seen as a barrier. Social historians have been more forthcoming in revisiting data sources because of their willingness to embrace the slow and rigorous, but commonly accepted, practice of document analysis and the need to evaluate methodically the very sources they are revisiting. However it can be terribly time-consuming to locate suitable data sources, and to locate, for example, paper materials that may reside in traditional archival locations with limited access. New ways and tools that more efficiently expose the content and context of digital data sources may help reduce the burden on researchers.

4. The constraints of informed consent may become an obstacle to re-using data too. Informed consent is an ethical and legal requirement of the research process. Archived data should always conform to ethical and legal guidelines with respect to the preservation of anonymity when this has been requested by informants or guaranteed to them. However, consent must be thought through at the time of research proposal planning and writing and be tailored towards the specific research questions and the sample. Often consent is not addressed until late in the research process by many researchers, and verbal consent alone is typically no sufficient for longer-term sharing and for effective use of research findings by the original researcher. Failure to realize the need to gain informed consent means that research efforts and the opportunities for archiving and secondary analysis are jeopardized from the start.

   Consent and agreements for sharing can be made at the time during the research process/ fieldwork—and afterwards. In addition, various additional strategies for sharing data such as editing the original data, restricting access/vetting and applying user undertakings concerning usage with legal back-up. Pragmatic strategies are also required to aid the commonly accepted practice of anonymization or pseudonymization. Researchers require more guidance on this area to better understand the nature and implications of consent and confidentiality (UK DATA ARCHIVE, 2010).

5. Intellectual Property Rights (IPR) or threat of misinterpretation may be a reason why an original investigator may oppose re-use. But knowledge is also power, and pressure to share and expose research findings arising from public funding is now a reality. Indeed, citing data can be highly beneficial for the originator, and almost certainly outweighs the risk of someone making a false claim based on misguided interpretation of data. The greater data are described, the harder it is to accidentally misuse them.

6. There is a lack of a wide range of publicly available catalogued research data which may be perceived as a barrier to the idea of undertaking secondary analysis of qualitative data. While in the UK, the Economic and Social Data Service (ESDS) has done much to facilitate resource discovery for qualitative data, only a tiny fraction of data is available. There are some insistent voices

who suggest there is a widespread reluctance to deposit qualitative data with a research archive. While this was partially true some ten years ago, today we see a new generation of qualitative researchers who are more inclined to either embrace or gracefully accept the value of sharing data. At the UK Data Archive, where some 200 qualitative datasets are cataloged, user figures have soared, particularly for use in research methods teaching. Supply and demand will increase in time, and forthcoming technologies and joint efforts will enable us to browse across data all over Europe. [29]

More recent debates about re-using data often challenge basic assumptions, such as the meaning of reuse, what are "data" and whether "use" and "reuse" may or may not be the same thing. Such debates have helped to shed light on how researchers can best approach "old" data and what kinds of caveats need to be made when examining them (BISHOP, 2009). [30]

5. Where Can you Find Qualitative Data?

In the social sciences raw data are rarely published or even regarded as publishable assets. Efforts are devoted to the publication of journal papers and books to meet the demands of academia, yet a rich collection of data can be viewed as having value in its own right. [31]

If we take a look across the world in an attempt to identify qualitative data source that could be openly consulted we find problems. First is the general lack of many national efforts to either gather together or draw attention to existing research sources. Second is the lack of infrastructure and indeed more practical procedures for preparing, storing and disseminating qualitative data. Throughout the world there are innumerable archives which collect (mainly historical) qualitative material, as well as a large number of sound archives and ethnographic archives, but there are few common descriptive standards, no integrated resource discovery and often access to collections is poor. One of the earliest and perhaps best known sources in the UK is the collection of papers resulting from the 1930s social research organization, "Mass-Observation." These were established as a public archive at the University of Sussex in the early 1970s and since then have attracted a steadily increasing number of researchers (SHERIDAN, 2000). [32]

Other data collections that were retained were typically stored as in-house research resources, such as the Berkeley and Oakland cohorts from the 1920s at the Institute for Human Development at Berkeley (JAMES & SORENSEN, 2000). In the case of eminent scholars, on retirement, papers were often transferred to their local university archives. In these archive collections we often find papers representing the whole life of a researcher. In addition to primary research data created by the investigator during the research process, administrative documents concerning the research, such as grant proposals, associated correspondence and the products of analyses, such as manuscripts, are often kept. A collection may also contain "secondary" sources utilized for a particular research study, such as newspaper clippings, organizational or medical records.

University archives therefore retain the cultural and material residues of both institutional, and theoretical or intellectual processes, for example the development of ideas within a key social science department. [33]

The material from Paul THOMPSON's national study of "Family Life and Work Experience before 1918", a unique and unrepeatable set of 444 interviews with men and women born before 1918, and conducted in 1972, were kept on a short-term basis in a special room within his own Sociology Department, which consequently became the basis of a series of books and articles by visiting scholars, but had no secure future (THOMPSON, 2005). In 1987, Paul THOMPSON established the National Life Story Collection as an independent charitable trust within the oral history section of the British Library National Sound Archive. The projects archived include, amongst others, lives of the book trade, the financial elite of the City of London and workers of British Steel. [34]

Across the world the oral history community now has a professional interest in preserving tape recordings gathered from oral history interviewing projects. In the U.S., Columbia University Library has run an oral history archive for over forty years. Notable examples of oral history archives across Europe include: in Germany the oral history archive of "German Memory" based in Hagen comprises some 1,500 life history interview recordings with witnesses of time periods from East and West Germany (LEH, 2000); and in Hungary, the 1956 Institute holds oral history interviews, trial records and photographs dealing with research relating to the 1956 Hungarian Revolution, its development and subsequent effects (LUX, 2000). [35]

6. A National Qualitative Archive: ESDS Qualidata

In the UK no infrastructure existed for the systematic archiving and dissemination of qualitative data from social science research as it did for survey data. The Economic and Social Research Council (ESRC) recognized from very early on in 1967, the value in retaining the most significant machine-readable data from the empirical research which it funded by establishing a Data Archive. Since the 1970s, social science data archives across the world have typically acquired a significant range of data relating to society, both historical and contemporary, from sources including surveys, censuses, registers and aggregate statistics. Equally, these centers of expertise have established networks of data services for the social sciences which foster co-operation on key archival strategies, procedures and technologies. [36]

Thus crucial survey data can be re-analyzed by other researchers, and the money spent on research has become not only an immediate outlay but an investment for the future. There was, however, a significant gap in this policy in that qualitative data were rarely acquired, even when much interview data became transcribed in word processed form. When a small pilot study commissioned by the ESRC was carried out by Paul THOMPSON in 1991, it was revealed that ninety percent of qualitative research data was either already lost, or at risk, in researchers' homes or offices. However the ten percent "archived"

were found not to have the basic requirements of an archive, such as physical security, public access, reasonable catalogs, with recorded material or listening facilities. It was further calculated that it would have cost at least £20 million to create a resource on the scale of that at risk. For the older British sociological material, moreover, the risk was acute, and the need for action especially urgent. This was borne out by the very recent destruction of research data on the classic British community studies of Banbury (STACEY, 1974); on race and conflict in Sparkbrook (REX & MOORE, 1967). [37]

In 1994, with support from the ESRC, the first UK qualitative data archiving project on a national scale was established at the University of Essex. Its first task was a rescue operation aiming to seek out the most significant material created by research from past fifty years. The second was to work with the ESRC to implement a Datasets Policy (ESRC, 2010) to ensure that for current and future projects the unnecessary waste of the past did not continue. Qualidata was not set up as an archive itself, but as a clearing house and an action unit, its role being to locate and evaluate research data, catalog it, organize its transfer to suitable archives across the UK, publicize its existence to researchers and encourage re-use of the collections (CORTI, FOSTER & THOMPSON, 1995; THOMPSON & CORTI, 1998). [38]

7. The Architecture of Data Provision: Traditional Archive Repository vs. National Data Archive

In the earlier debates as to how to operate the UK national qualitative archive, two models of data storage and provision were identified: a centralized facility in a single location or a hub and spokes model. These are of course extreme models representing opposite ends of the spectrum. The UK Qualidata was established using the latter approach, with the center as the hub, bearing responsibility for evaluating, acquiring, preparing, documenting, setting access conditions, transferring and publicizing data. A network of traditional archives, largely situated in University libraries, acted as spokes which enabled the long-term storage of data. For Qualidata's initial stages, when most of the research data handled were paper-based, it was very clear that a distributed or "clearing house" model had costs savings over a centralized one. All the long-term costs of maintaining this paper-based material have been off-loaded to the archives which have agreed to house the data, and ESRC has been saved the mounting expense of maintaining its own central archive with appropriate storage conditions, trained archival staff, maintaining facilities for research users, etc. [39]

Should data reside in one place or be dispersed? The former can ensure standards—in terms of data quality, preservation and controlled access, whilst the latter places the emphasis on the distribution of material to a network of high-class traditional archives, many chosen because they are at centers of high research activity in particular fields. Locally placed materials across the country have the downside of the researcher having to make a personal visit to access materials, where they might listen to a recording, browse paper materials and copy materials at their own cost. Some local archives are digitizing materials, but

money is often scarce and very few offer on-line provision. They do rely on the researcher having time to visit and immerse themselves ... which is what historians have done for centuries! But, today there is definitely the "need for speed." The length of the research has decreased significantly and it is far more competitive. If data are to be re-used by others they need to be easily and rapidly accessible—"take away," free or at least affordable, well documented and supported—by both technology and by humans. [40]

Descriptive systems also differ between the two communities. An archivist will typically catalog a collection, say of a retired sociologist's papers by chronology, perhaps subdividing them into periods when the person held different professional roles. By contrast, a data archivist will identify and pull out distinct research studies and catalog them as distinct studies. This, of course, has implications for trying to find data. Typically, the user of qualitative data is a social scientist, rather than a historian, and thus study level description is critical because they wish to re-analyze or replicate a study, as discussed earlier. Because many empirical undertakings are now utilizing mixed methods strategies in their research design, it is even more crucial to describe data at the study level to cover, for example, both numerical datasets and qualitative interview materials. The traditional archive community uses the international cataloging standard, the General International Standard Archival Description (ISAD(G)) while the data archiving community use the Data Documentation Initiative (DDI). While some of the descriptive elements map, they follow the different logic of the communities' own practices: personal or corporate fonds typically by chronology versus unique study or data description. [41]

In the mid 1990s, the Qualidata unit pioneered systematic procedures for archiving and providing access to qualitative data within a meaningful international social science framework, rather than using purely historical archival practices. The procedures included: sorting, processing and listing both raw data and accompanying documentation; systematically describing studies for web-based resource discovery systems; establishing appropriate ethical frameworks and mechanisms of access; and training in the re-use of qualitative data (CORTI, 2000). By 2009, Qualidata has acquired, processed and cataloged over 160 data collections, and cataloged a range already housed in archives across the UK. Surviving "classic studies" data from key researchers were also rescued, including well-known British projects such as: Elizabeth BOTT's study on "Family and Social Network" (1956); John GOLDTHORPE and colleagues "The Affluent Worker" (GOLDTHORPE, LOCKWOOD, BECHHOFER & PLATT, 1968); Stanley COHEN's "Folk Devils and Moral Panics" (1971); the entire life's work of pioneering UK researchers such as Peter TOWNSEND's "Family Life of Old People" (1957), The "Last Refuge" (1962) and "Poverty in the United Kingdom" (1979); and Paul THOMPSON's life-history interview studies of "The Edwardians" (1975) and "Families, Social Mobility and Ageing, an Intergenerational Approach" (THOMPSON, ITZEN & ABERSTERN, 1990). THOMPSON and CORTI (2004) provide an introduction to a selection of talks by some of these leading pioneers of UK social research given at a symposium in 2000. [42]

During the initial pilot period of Qualidata, the most critical activity was to: build a small user community and recognition of secondary analysis as a robust method; to work with persuaded funding bodies to encourage archiving and data sharing; to promote and encourage academic debate; to creating synergy and harmonization with quantitative data archiving (e.g. by gaining recognition by international data archiving community). Qualidata certainly was successful in proving service viability beyond pilot period. [43]

However in 1999-2000, the funders of Qualidata needed to reduce some of their investment in smaller centers, and Qualidata was targeted. The center suffered a significant cut in funding and loss of key staff during this period. Fortunately, negotiations with the UK Data Archive, also based at Essex, in 2001, enabled the original Qualidata unit to start a new life as a specialist unit housed within the UK Data Archive. Its focus was now on acquiring and distributing digital data. The key drivers behind merging the data services were multi-fold: the concerns over funding—joining forces enabled economies of scale; the desire to create a one-stop social science data shop built around a single hub giving Essex a unique portfolio of data expertise and technological vision; the need to strengthen alliances to meet a tendering process ensuing from the ESRC's strategic review of their data archiving and dissemination services; the wish to streamline and simplify the data deposit process for ESRC depositors; and a growing need to reduce the demarcation between qualitative and quantitative data. [44]

Phase I of the integration process was complete by October 2001, whereby many of the strategic and operational procedures for data acquisition, processing, metadata creation and dissemination were in place. Moreover staff was fully integrated within the UKDA infrastructure. The period until December 2002 saw further efforts to harmonize working practices. First, a program of cross-divisional training was initiated to broaden the data processing skills of UKDA staff to cover a wider range of data types, including mixed methods datasets. Second, the Qualidata website and the online catalog were transferred to the UKDA servers. Finally, Qualidata has rolled out a program of work to create freely available online User Guides for all its major collections. [45]

Since 2003 Qualidata has been a specialist service of the broader UK Economic and Social Data Service (ESDS) led by the UK Data Archive. The service is a jointly-funded initiative sponsored by the ESRC and the Joint Information Systems Committee (JISC) and provides access and support for an extensive range of key economic and social data, both quantitative and qualitative, spanning many disciplines and themes. The dedicated qualitative data service provides access and support for a range of social science qualitative datasets and is responsible for generating a number of data enhancements, and for providing information and training resources that focus on strategies for re-analyzing qualitative data. The history of Qualidata offers a pioneering exemplar to other countries as to how to enable the systematic collection and secondary use of qualitative data. [46]

Table 1 sets out the approximate budget and staffing levels for the period 1994-2009.

Year	Funding £	Funder	Staffing
1991	Small 2 year scoping study grant	ESRC	
1992			
1993			
1994	700k over 5 years	ESRC	3 staff 2.2 FTE
1995			5 staff 3 FTE
1996	50k for establishing Policy archive	Joseph Rowntree Foundation (JRF)	7 staff 3.0 FTE
1997	250k funding for 3 years	ESRC	
1998	39k for specific preservation project	Medical Research Council (MRC)	
1999			
2000	100k for 1 year	ESRC	3 staff 3.0 FTE
2001	200k for 2 years	ESRC	
2003	Share of total 700k for 5 years	ESRC/JISC	6 staff 3.25 FTE
2007-now	Share of 1400k for 5 years	ESRC/JISC	6 staff 3.5 FTE

Table 1: Qualidata funding 1994-present NOTE: 2001 onwards also access to technical infrastructure, secretarial, human resources and finances support; FTE = Full-time Equivalent [47]

8. How Qualidata Acquire Qualitative Data

ESDS Qualidata focus on acquiring digital data collections from qualitative and mixed methods studies from a wide range of social science disciplines. All data are considered, either proactively or reactively, but the main inflow is via ESRC research grants, through which primary data are collected. Thus from an acquisitions point of view, the Archive has been fortunate in that it has been sufficiently supported to build up both a viable operation and a stock of data through the framework and infrastructure of a national policy for archiving data. [48]

All archives have accessions policies to ensure that all materials deposited meet certain criteria. For Qualidata priorities focus on:

- rich data that are well-documented—a string of "Yes" and "No" would be dull and rather limited;
- format, usability and condition of material;
- data that have further analytic potential than the original investigation (depth; large-scale; longitudinal);
- relative importance or impact of the study (e.g., had a major influence in its field and/or representing the working life of a significant researcher);
- copyright and confidentiality issues have been dealt with;
- complementary to existing data holdings (series). [49]

Data that are not accepted for formal preservation are offered to the Archive's own self-archive, UKDA-store (UK DATA ARCHIVE, 2009). Those who have ESRC funding and are bound by the funder's Research Data Policy, and have not sought consent to share where it was felt possible to have done so, are sent a warning letter and referred to ESRC. An unwillingness to share can lead to the last part of research grant not being paid. [50]

But positive approaches are made as well as disciplinary ones. ESDS Qualidata plays a pivotal role in working closely with data creators to ensure that high quality and well-documented qualitative data that have longer-term value are produced. As part of its core functions, both general guidance and a dedicated advisory service are provided for data creators and depositors on research project management, issues of confidentiality and consent, and documentation of data for archiving. Taken seriously at the start of a research project, good practice across these areas extends the usability lifetime of data and potentially enables creative and flexible re-use of data. [51]

There can be a very long lead time between locating data and acquiring data. Our own record is 15 years (data promised in 1994). But letting go of data can be a painful experience and may require extensive "negotiation" about certain issues (and longer term counseling). But depositing can be a good experience too and worth talking/shouting about. News about making "donations" can travel fast spawning phone calls to the effect of, "I hear you have Prof. X's data, don't you want mine?!" [52]

9. Preparing and Delivering Data

At Qualidata, when data come in priorities are assigned to them, so that the inflow of data meets the resources available for preparation. Data are "processed" at the level of the whole study and the constituent parts, such as each interview or focus group. This includes activities such as:

- error checking and validation of collection contents;
- checking that consent and confidentiality agreements are met;
- undertaking basic reformatting of text ;
- possibly anonymizing identifiers;

- creating of digital user guides, data listings;
- agreeing and applying user access conditions;
- mounting the data for download. [53]

Qualidata has published its data processing techniques (ESDS QUALIDATA, 2010a) alongside its survey processing procedures. The Archive preserves original materials but supplies copies under license and via any access conditions specified by the depositor. A standard catalog record is prepared describing the collection and study (DDI) and a data list (inventory of data items) and user guides are prepared. [54]

Qualidata's studies are part of UK Data Archive's online catalog that holds some 5000 data collections across the disciplinary and methodological spectrum. The catalog also points to other accessible sources of qualitative data across the UK not physically held by the Archive. Data are available from web download behind an authentication system for registered users. Users sign up to an agreement and tell us about intended data use. Some data require depositor permission, which is handled manually, and some data are available to browse online through Qualidata Online. [55]

Qualidata continues its earlier role in facilitating the preservation of important large paper qualitative research collections for deposit in traditional paper archives, top level cataloging and, where appropriate, selective digitization. [56]

10. Enhancing Qualitative Data

Users of qualitative data want easy access to data and they want more than just raw data. "Enhancing" collections so they can be used more easily and effectively should be central to an archive's mission. It is never just about preserving original research documents. [57]

For ESDS Qualidata enhancement consists of three activities.

1. The first consists of digitizing older paper collections to an electronic format. There are three levels of digitizing: image scanning and creating a searchable PDF; image scanning and optically character read (OCR) and edited to word processed format; and image scanning, optically character reading and marked-up with XML.
2. The second form of enhancement consists of contextualizing raw data by augmenting data with additional materials to make the collection more useful. An example would be adding materials that help reveal both the context and the process of the original research and methodological approaches. The nature of this contextual material varies greatly as it depends both on the nature and complexity of the collection and on what materials are available from the research originators and/or depositors.

   Typically, the materials are assembled into a user guide and made available in bookmarked PDF format to accompany the study's catalog record. A user

guide may include samplers that provide highlights of the materials to illustrate the potential for research or teaching.

3. The third is about providing online search and browse facilities to access raw data using a web browser. The ESDS Qualidata Online system was centered on a vision for more flexible access to digital qualitative data, via real-time online browsing of data and utilizing non-proprietary XML-based formats and systems for preserving, searching, and disseminating qualitative data (CORTI & BARKER, 2003). The system supports more powerful resource discovery and offers greater scope for searching and browsing content of data (over higher level study-related metadata). Since users can search and explore (textual) content across different data collections directly, data can be retrieved immediately. In this system, depending on the collection, various combinations of interview transcripts, interview summaries, methodology and background materials across multiple datasets are available to browse and search. For example, researchers can select and search interviews from multiple collections, including the Mothers and Daughters study (see below), Paul THOMPSON's study of 100 Families: "Families, Social Mobility and Ageing, an Intergenerational Approach," 1900-1988 (THOMPSON, 2005) and Dennis MARSDEN's "Mothers Alone" study, 1955-1966 (MARSDEN, 2005). XML mark-up allows potential linking to other sources of information. [58]

An example of an enhanced collection is the "Mothers and Daughters: Accounts of Health in the Grandmother Generation, 1945-1978 (SN 4943)" by the UK-based sociologist, Mildred BLAXTER (2008). Preparation of the research collection of 46 interview transcripts involved: conversion of data from paper to searchable rich text format by OCR, with extensive editing and formatting; production of a brief Scots dialect glossary; and compilation of extracts from an interview with the author about the experience of conducting this research. This can be viewed at http://www.esds.ac.uk/qualidata/online/data/blaxter/introduction.asp. [59]

Annotated data can enrich searching possibilities, and for large studies there is a good case for retaining already coded data to help navigate a large amount of text. However, as most coding is subjective and often geared towards quite specific themes relevant to the analyst, it may not be that useful for the re-users' topic of investigation. [60]

11. Facilitating Re-Use of Data

The accumulation of documented and available qualitative data resources in the UK has certainly encouraged the take-up of re-use of archived data. Greater re-use of data also reflects the efforts invested in promoting or re-packaging data collections to meet researchers', teachers' and students' needs. Qualitative archives have a role to play in raising further the level of awareness of the availability of and potential for utilizing qualitative data sources. Experiences of secondary research have begun to find their place in social research literature, as the reflections in the *FQS* Special Issue on "Secondary Analysis of Qualitative

Data" testify (CORTI, WITZEL & BISHOP, 2005) and the Qualidata-use case studies mentioned earlier. [61]

ESDS Qualidata undertake a wide range of dissemination and outreach activities, such as a dedicated help desk facility, regularly updated informative and suggestive web pages and FAQs, an email discussion list to post news and events and host debates, newsletter and journal outlets, and running events and getting out and about. [62]

Where time permits, publishing in "sister" service newsletters and journals on various aspects of archiving and re-using matters can be rather productive. Reaching teachers and student populations is also helpful given that post graduates are likely users of archived data. Although academic output is not a specific remit of ESDS staff, it is always desirable. Open-access journals such as *FQS* have been an excellent outlet for spreading the news. [63]

A program of training events and activities is also critical to expanding the user base. ESDS Qualidata runs workshops that aim to enhance the methodological and substantive understanding, and secondary analytical potential, of qualitative data. These include: awareness and introductory days and road shows; tailored user and "data confrontation" workshops; thematic events, by discipline or method; ways to re-use data, depositors and re-users talking, and re-using data in CAQDAS software applications. ESDS staff also contributes to the UK Data Archive's series of workshops on best practice in managing and sharing data, aimed at research investigators or grant-holders. At these events, the qualitative angle is on ethics and consent surrounding re-use of data, transcription and anonymization strategies, how to gather sufficient context and use of suitable data formats. Qualitative focused events are usually oversubscribed, suggesting that the supply cannot even begin to meet the demand. [64]

Workshop sessions on data preparation and management have also been invited from various research programs, the International Sociological Association (ISA) RC33 section on logic and methods, and the annual International Association for Social Science Information Services and Technology (IASSIST) conference. It is vital that archives holding qualitative data form part of these communities and keep up to date with the developments and trends in the field. [65]

In order to add value and share the training resources arising out of workshops, it is useful to post online the materials used in outreach events. Printed guidance can complement events. Encouraging teachers to participate in evaluating the resources helps them consider contributing their own re-use ideas. This has been done quite successfully by Qualidata (ESDS QUALIDATA, 2010b, 2010c). [66]

12. Other UK Qualitative Research Initiatives

There have been some enterprising qualitative methods initiatives in the UK reflecting a boost for qualitative research and opportunities for collaboration for Qualidata. These include:

- The Qualitative Archiving and Sharing Demonstrator scheme (QUADS) was a short lived scheme of half a million pounds investigating particular ways of showing and archiving data that complemented the "Qualidata" model (CORTI, 2005).
- The National Centre for Research Methods (NCRM) was established by the ESRC in 2004 as a network of research groups, each conducting research and training in an area of social science research methods. It is one of ESRC's major investments that aim to promote "a step change" in social science research methods capacity and capability in the UK, and some of the "nodes" are qualitative.
- The National Centre for e-Social Science set up, and recently closed down by ESRC was built to stimulate the production of new computer based tools and services and their uptake by social scientists, to enable them to address the key challenges in their research fields in new ways.
- In 2007 ESRC supported a dedicated national qualitative longitudinal study known as Timescapes. It is exploring how personal and family relationships develop and change over time. Rich data are being collected for the Timescapes archive aimed at offering exciting possibilities for researching data through time and across generations.
- In 2009 the ESRC and EPSRC funded a project called ENSEMBLE (Semantic Technologies for the Enhancement of Case Based Learning) which is part of the Technology Enhance Learning Program. The project is building semantic web applications for case-based learning in education with reference to how Web 2.0 and Web 3.0 tools can be used for representing, visualizing and communicating data. Much of the data are qualitative. [67]

13. What about Europe and Qualitative Data?

Over the past 10 years Qualidata has been monitoring the European scene—we have been lonely on our island and wanted European friends. In the beginning some of our contacts were small local or regional archives of oral and life history, and some traditional archives with thematic research collections. In the data archiving community it has taken a long time to accept the idea of adding qualitative data to their survey collections. Some national survey archives have been acquiring qualitative data, and some are actively considering the idea and are in the process of evaluating policy or undertaking feasibility studies. Others have not considered the opportunity yet as have had no time or resources to investigate, think it may be an impossible task or have no interest in qualitative data. [68]

In the past ten years ESDS Qualidata has provided expert guidance to a number of national centers currently setting up national qualitative archiving strategies and centers. These include: Switzerland (BERGMAN & EBERLE, 2002), Finland (KUULA, 2000), Germany (OPITZ & MAUER, 2005) Denmark (FINK, 2000), France, Australia (CHESHIRE, 2009), Ireland, Netherlands, Austria, USA and Lithuania. Very few of these have, as yet, established qualitative units or routinely acquire qualitative data. In 2000 a workshop in Amsterdam bringing together those groups in Europe working in the area of qualitative data archiving (MRUCK, CORTI, KLUGE & OPITZ, 2000). Following that event, a network of qualitative data archives (INQUADA) was launched but at the time there was not the critical mass, nor funding, to make it last. Many of the new initiative were small research projects with no stability. A critical mass has, however, been formed in the IASSIST data (primarily survey data) archiving network, with many archives now starting to bring in qualitative data into their portfolio. Figure 1 shows the distribution of national data archives who I know are actively dealing with qualitative data.
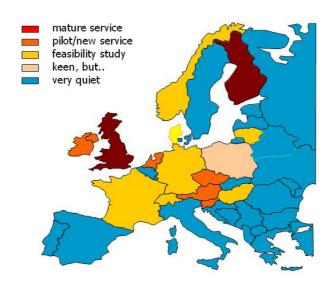

Figure 1: Distribution of national data archives and qualitative data [69]

More recently, in April 2009 a one-day international workshop was held in Bremen, Germany which brought together delegates from these centers and those interested in the development of qualitative longitudinal research and data resources across Europe. The workshop was organized as a collaborative venture between the UK Data Archive, the Timescapes Qualitative Longitudinal Study and Archive, and the Bremen Life Course Archive, with support from the Council of European Social Science Data Archives (CESSDA) under its European Commission FP7 Preparatory Phase Project. The participants agreed to collaborate on initiatives surrounding qualitative data sharing. [70]

14. How Do They Get to the UK Position?

It is very important to have a data archiving national infrastructure that is recognized and supported by the research councils and key funders. Even a five year stretch of good funding can be really beneficial to start up. [71]

If a data sharing policy for research grants can be implemented you are onto a winner because researchers are obliged to consider sharing from the start. For the ESRC Data Policy (ESRC, 2010) researchers must complete a whole page on how they will consider and prepare data for sharing, ensuring issues of consent and IPR are considered and written down up front. Successful data sharing policies require there to be commitment from the funder in contractual obligations, a supportive infrastructure, encouraging researchers to consider and seek advice on liaise on data sharing practices throughout the lifecycle of data creation, encouraging deposit of ethically and legally-shareable high quality data and documentation, and peers reviews to advise on the longer-term value of research data. [72]

For an archive it is critical to have partnership and communication with funding bodies, receive regular updates about new data creation activities and negotiate understood policing and penalties for "defaulters" where a data sharing policy has been put in place. If data are recognized as a valid citable academic output (e.g. with a persistent identifier such as a type of ISBN for data then recognition can be gained for both sharing and re-using data. [73]

An archive will need a very clear data acquisitions strategy, so that the right kinds of materials are brought in, reflecting quality, usability and demand. Country-specific ethical matters relating to sharing data need to be considered. Robust procedures for data preparation and delivery must be agreed and set up. All of these strategies and methods need to be flexible to work for all the kinds of data that may come in. If these can be based on common shared standards all the better as documented guidance and collaboration is really beneficial. [74]

Next come people. A good archive needs leadership and direction, with individuals who come with a (good) reputation, who are connected internationally, and have an eye for innovation. Good management and highly skilled staff are essential—always hard to retain on short-term funding research projects. Staff should be skilled across research, technical and training/support areas and I feel must embrace qualitative and quantitative methods. I strongly believe that the language of research should be in one tongue. Adding the capacity to talk confidently about metadata and its technologies may mean one needs to be bilingual! Staff needs to have access to research and technical networks. ESDS Qualidata has staff who span a number of disciplines providing a richness in terms of communication opportunities. Promotion, user support and training is essential but can be expensive and demanding on a tightly staffed unit. [75]

Finally an archive does access to skilled users—skilled in using qualitative research methods and in approaching data which they have not collected. In the

UK, methods training is on the agenda, with a national shortage of qualified data analysts—survey and qualitative. The hardest part is promoting cultural change, and this will be vital in a country whose research communities may not yet value the sharing and re-use of qualitative data. [76]

15. As a Qualitative Data Archivist, What Would Be My Wish List for the Near Future?

There are many things I would like to see happen, but in particular I have selected the following:

- the spawning of well-funded qualitative archives across Europe, and opportunities to collaborate on shared practices;
- community tools that can offer us smart multi-media delivery and play-with-data systems;
- a place for re-use of qualitative data and data management in the national curriculum and all research methods training courses;
- more examples of methodological debate on data sharing and re-use;
- more researchers sharing high quality data;
- more researchers using data! [77]

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