

Social Science Data Archives in Eastern Europe

Results, Potentials and Prospects
of the Archival Development

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Results, Potentials and Prospects
of the Archival Development

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Brigitte Hausstein
The organizer of the workshop

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Preface: Opening Remarks

Brigitte Hausstein, GESIS Branch Office Berlin/Central Archive Cologne

Dear colleagues, dear guests!

It gives me great pleasure to welcome you to the Workshop on “Social Science Data Archives in Eastern Europe – Results, Potentials and Prospects of the Archival Development”.

I know that recently many of you have been extremely busy in managing research projects, processing data and writing papers. Yet, you have found time to attend this workshop and contribute your experience.

This meeting would not have been possible without the support of the UNESCO’s Management of Social Transformations Programme (MOST) and the German Social Science Infrastructure Services (GESIS). In fact, this is the concluding event of the project started in the Summer last year. I would like to thank UNESCO for the support given to the project, and I hope that the collaboration with Eastern European Data Archives will continue.

As many of you know, GESIS has been supporting the efforts to build up the East European social science infrastructure over the past several years. Since exactly ten years its Branch Office here in Berlin has been working on the East-West transfer of social science information and data.

This workshop is a follow-up event to the meeting that was organized in May 2001 within the framework of the annual conference of the International Federation of Data Organizations (IFDO) and International Association of Social Science Information Service and Technology (IASSIST). At that time the emphasis was primarily put on short presentations of the data archives and their data collections. While the outcome of the previous meeting was highly appreciated not only by the participants, we felt that it would be well worth having a workshop concentrating on the exchange of experience on establishing a data archive and the evaluation of the potential for the establishment of data archives in Eastern European countries without a developed data infrastructure. Consequently, we applied for financial support and we were successful. The support provided by UNESCO enables us to hold this workshop.

Looking at the agenda you can see that there are three days of intensive work waiting for us. Reports on data archiving in 12 Eastern European countries will be presented and the strategies for the further archival development will be discussed as well.

The wide participation in this Workshop is gratifying for several reasons. Here are three of them:

First, I should like to address words of appreciation to the representatives from the international data archive and network organizations UNESCO, IFDO and the Council of European Social Science Data Archives (CESSDA). These organizations have been promoting recently founded or growing national data archives all over the world for a long time and have been giving essential support to young Eastern European data archives.

Second, representatives of data archives and archive initiatives from Eastern European countries are going to present comprehensive reports on the state-of-the art of the empirical social science in their countries. I am sure the different experience in the countries will start a lively discussion and an intensive exchange of ideas as the preparatory meeting in November 2001 has already shown.

Third, we will have the benefit of welcoming highly-qualified experts from west European Data archives. I appreciate very much your engagement in preparing commentaries on the country reports and your participation in this Workshop.

From my point of view the final discussion scheduled for Sunday morning is not intended to be merely a summary of the papers and discussions but the constitution of a new level of information and ultimately also network building in the sphere of data archives in Eastern Europe.

For reasons of time I will stop here. It only remains for me to wish all of us success in the days ahead, and to wish you an interesting and pleasant stay in Berlin.

Preface: Welcome Address

Walter Hirche, Vice-President of the German Commission for UNESCO

Ladies and gentlemen

It gives me great pleasure to welcome you on behalf of the German commission for UNESCO on the occasion of the opening of this experts meeting on social science data archives. I am confident that this project contributes to the furtherance of international cooperation and the sharing of knowledge which are also major mandatory concerns of UNESCO as means to contributing to peace and development.

You may wish to know that the German commission for UNESCO, primarily, is an advisory body to the German government and other competent authorities in this country on matters relating to UNESCO. It has also the task to take responsibility in the implementation of UNESCO's programs, as well as to raise the public awareness on UNESCO related issues. For these purposes, the commission co-operates with the government and with services, organizations, institutions and various individuals in the formulation and execution of UNESCO's programs, and disseminates information on the objectives, program and activities of UNESCO, and endeavors to arouse public interest in them. At least the latter has been done by the commission with respect to this workshop by way of issuing a press release. We are not unhappy about this minor involvement. Thanks to the initiative of the German Social Science Infrastructure Services (GESIS) and its Branch Office Berlin, which, since ten years, has been promoting infrastructures for social sciences in Eastern Europe, and thanks to the support from UNESCO and its Programme on the Management of Social Transformations (MOST) this workshop could be realized. Against the background of the renewed mutual commitment of science and society, as endorsed by the world conference on science (Budapest 1999), this may well be seen as an expression of self-responsibility and the freedom of science (the latter increasingly restricted by ethical constraints) and the supporting role of governmental bodies.

Two years ago, the German Commission for UNESCO organized a meeting of experts as a follow-up of the World Conference on Science (WCS). The objective of the meeting was to identify concrete ways for implementing proposals to foster international scientific cooperation following the World Conference on Science and the World Conference on Higher Education (WCHE, Paris 1998). Starting point for the meeting was paragraph 65 of the science agenda - framework for action as approved by the WCS. Against the background of an assumed tendency towards knowledge monopolies caused by the protection of intellectual property rights, the experts discussed the potential of the intergovernmental and international programs of UNESCO and the World Science Council (ICSU) with respect to improving data collection and treatment as well as to facilitating access to scientific knowledge (via the Internet). It can be expected that especially developing countries and countries in transition suffering from insufficient

scientific infrastructures could take a more active part in research programs by drawing on scientifically relevant data published electronically in the Internet. Consequently, the purpose of the meeting was to examine the question how the digital transfer of scientific data can be effected under given legal conditions, and which proposals could be brought to the attention of UNESCO, ICSU and other international organizations with respect to their programming processes. The experts discussed the topic in general, and in particular the issues of data collection, processing, dissemination and policy in the framework of international natural and social science programs as well as protection of data bases, aspects of copyright and technical security. The summary report of the meeting contains some general conclusions as well as a set of numerous specific recommendations, among them several referring to the social sciences and relevant international professional organizations. I could imagine that this report is of some relevance to this workshop.

I am extremely pleased that UNESCO has associated itself with this workshop. With due respect to the Organization's mission as a capacity-builder and a catalyst for international cooperation, the 31. General Conference has confirmed that UNESCO's activities shall be based on three main strategic thrusts, among them "promoting empowerment and participation in the emerging knowledge society through equitable access to, capacity-building and sharing of knowledge". In this respect the program on the "improvement of policies relating to social transformations and promotion of anticipation and prospective studies" is geared to strengthen the knowledge base, professional infrastructure, and policy relevance of the social sciences by improving the access to the results of social science research, by networking and capacity-building, and by concluding partnerships with selected non- governmental organizations. This clearly indicates that what at first sight seems to be a sub-regional meeting is part of a regional and worldwide strategy. To bring about a "Research Area Europe" also in terms of scientific infrastructure is only one further step. What matters in the end is the international data transfer. In conclusion, let me express the hope that networking social science data archives in Europe will become a strong element of the still to be worked out regional strategy of UNESCO for scientific cooperation and the building up of knowledge societies, as prerequisites for building a world of peace and progress through the sharing of knowledge internationally and worldwide.

Data and Information Transfer between Eastern and Western Europe

Brigitte Hausstein, GESIS Berlin/Central Archive Cologne

1. The German Social Science Infrastructure Services (GESIS)

The main task of GESIS is to collect and transfer information on research, literature, surveys and data in the field of Social Sciences. It is jointly funded by the Federal Republic and its states and has been in existence since 1986. GESIS comprises three regional centers:

- the Social Science Information Centre in Bonn (IZ),
- the Center for Surveys, Research and Methodology in Mannheim (ZUMA)
- the Central Archive for Empirical Social Research in Cologne (ZA).

Although the individual participating institutions also performed such service functions before 1986, they now form a consolidated group within the framework of GESIS. Since 1992 GESIS has a Branch Office in Berlin.

GESIS' services include gathering and providing survey data generated by social research and the creation of data bases offering references to the social science literature, research projects and institutions. It also offers long-term observation of social developments as well as consultation service on methodological questions. The complete research service package is available on the Internet: <http://www.gesis.org>.

2. The special task of the GESIS Branch Office

The Berlin Branch of GESIS was born of German reunification. It was founded upon recommendation of the German science council as a special center for East-West European research cooperation. Since exactly ten years representatives from the IZ und ZA have been working on the furtherance of East-West transfer of knowledge, and the exchange of data, as well as the development of networks in the field of social science research and information. The efforts to build up the East European social science infrastructure are being supported in order to facilitate the increasing data and information exchange. The transfer of information and data is geared principally to:

- the dissemination of German research findings in the social sciences
- the assistance in the application of west European research findings and data in Eastern Europe

- the acquisition of East European research findings, empirical data, institutional descriptions and their distribution in Western Europe.
- the support of network activities.

Information transfer

With this aim the department of the IZ in the GESIS Branch Office has been conducting surveys in East European countries asking social science research institutions and scientists for information on research projects and institutions. The reported information is stored in different databases which form the basis for an extensive Internet service: (http://www.gesis.org/en/gesis_branch_office)

- online databases on East European research projects and institutions
- conference calendar: “Research on Transformation”
- SocioGuide “Internet-Sources of Social Sciences”
- mailing lists
- the Newsletter “Social Science in Eastern Europe”
- State-of-the-art-reports

Data transfer

The main focus of the ZA’s activities in the Berlin Branch is laid on assisting users in gaining access to data in its own data stock and in the largest European and American archives. It offers access to Comparative Studies with participation of Eastern European countries which have been archived in the ZA since 1965. Access to Election Studies and other specific studies from Eastern Europe is also provided. The data of these studies are prepared according to the archival standards and can be used for secondary analysis. (See: http://www.gesis.org/en/Data_service/eastern_europe/data)

To promote the acquisition, archiving and distribution of machine readable data for social science research in the countries of Eastern Europe it fosters the development of national data archives. The ZA is the European center for integrating the Eurobarometers, the International Social Survey Programme (ISSP), European Values Studies and the studies on elections to the national parliaments in Europe (ICORE) into internationally comparative datasets. The experience in gathering and distributing information, documents, advice and data, as well as scientific know-how, has been made available to the East European scientists who are working on the construction of data archives. These scientists are given a chance to learn about the working methods and services of

GESIS by attending as guest scientists and by taking part in training seminars. The efforts to create national data archives in Eastern Europe are also being supported by the inclusion of Eastern European countries in the comparative research programs and by direct co-operation with researchers.

3. Network building in the field of Data Archives in Eastern Europe

Through the Council of European Social Science Data Archives (CESSDA) (1) and the International Federation of Data Organizations for the Social Sciences (IFDO) (2) there has been intensive cooperation between the European data archives for many years. At the same time, there has also been a considerable growth in empirically-oriented academic social research in the states of Eastern Europe, and a very large number of market and opinion research institutes have come into being. A remarkable expansion in social, economic and political data gathering has been witnessed. However, systematic information on the data available in these countries is only partially accessible (3). Some attempts have been made to overcome this unsatisfying situation and to secure the free flow of data. There are data archives in Hungary, Estonia, Latvia, Slovenia and Czech Republic which have been created in last years. In Slovakia, Romania and Russia archiving activities are underway. But there are still no central archives e. g. in Lithuania, Poland, Bulgaria, Yugoslavia and Ukraine though, nor is there a network of co-operating archives such as exists in Western Europe. In this respect it was necessary to provide a platform for new data archives and archival initiatives in Eastern Europe to discuss general problems of archival and data services and to coordinate efforts for setting up data archives.

The New Data Archive Forum at the IASSIST/IFDO Conference 2001

The annual international conferences of IASSIST bring together data and archive specialists from the USA, Canada, Eastern and Western Europe as well as from Africa and Asia. During the last quarter of the 20th Century, IASSIST has held its annual international conference in Europe about every four years. IASSIST did so again, 2001 in Amsterdam in collaboration with IFDO. At this conference a special session for new archives was organized for the first time. The main focus of the session was on data archives in Eastern Europe but also representatives of new archives from Japan, Finland, Ireland and Greece joined the meeting. It comprised two case studies from Slovenia and South Africa and a Forum of representatives of data archives from Hungary, Estonia, Latvia, Czech Republic, Slovakia, Slovenia, Russia and Romania. (4) This Forum has been the first opportunity in the last years for data archive specialists from Eastern Europe to meet and share experiences. On the one hand the Forum provided a

comprehensive view of the progress achieved in the field of establishing data archives in Eastern Europe. On the other hand there was a common understanding of the fact that the new archives still need support provided by the international data and network organizations and experienced data archives.

The mailing list “East European Data Archives”

To foster the dissemination of news concerning data archives in Eastern Europe the GESIS Branch Office has been maintaining a mailing list since 2001. It is a moderated mailing list intended for a highly interested audience. The contributors to the news list reciprocally inform on their activities, new projects and initiatives in the field of data archiving. Information on promotional opportunities, grants, guest scientists, foreign exchanges (plans and reports), networks, project planning, employment opportunities etc. are also disseminated.

International Workshop on Social Science Data Archives in Eastern Europe – Results, Potentials and Prospects of the Archival Development

Despite the large-scale development of electronic communications in all scientific fields, experiences show that face-to-face communication remains essential, particularly in developing co-operation and networks. Therefore the GESIS Branch Office decided to organize a workshop, that should serve as a forum both to exchange experiences of how to establish a data archive and to evaluate the potential for the establishment of data archives in Eastern European countries without a developed data infrastructure. The workshop was aimed at the creation of a network of partners in East and West Europe, that should support the new data archives and promote further archival initiatives in Eastern Europe.

Thanks to the financial support provided by the UNESCO’s MOST Programme and GESIS the project “Social Science Data Archives in Eastern Europe – Results, Potentials and Prospects of the Archival Development” was started in Summer 2001. It was carried out in three steps:

1. On the basis of the information on research projects and institutional descriptions gathered by the GESIS Branch Office and its close contacts to the scientific community in Eastern Europe competent authors who are involved in social science research and who are experts in the field of empirical research in Lithuania, Poland, Bulgaria, Yugoslavia, and Ukraine have been chosen. They were asked to prepare country reports analyzing the state-of-the-art of the empirical social science research and evaluating the potential for the creation of a data archive in their countries. These reports should include the following topics:
 - Historical outline (empirical social research before 1989)

- Development of empirical research since 1989 and description of data collections produced by the academic social research institutes (Universities and Academy of Sciences), market and opinion research institutes and statistical offices
 - Regulations concerning the access to the data produced
 - Funding situation of empirical social research
 - Assessment of the potential for establishing a national data archive and views on further development
2. At the preparatory meeting in November 2001 the drafts of the country reports were presented and the agenda of the workshop in February 2002 was finalized. The aim of the preparatory meeting was to discuss the comprehensiveness of the analysis and problems of the selection and evaluation of the information. However, in view of the problems all rapporteurs were facing, a discussion on the data sharing culture, budget short cuts and brain drain was launched.
 3. The workshop in February 2002 brought together, besides the experts from Lithuania, Poland, Bulgaria, Ukraine and Yugoslavia, representatives of the existing or emerging data archives in Estonia, Latvia, Russia, Czech Republic, Slovenia, Romania and Slovakia as well as representatives from the Swedish, Finish, Australian and German Data Archive. It should serve the establishment of new archives in those countries where such facilities are weak and, at the same time, it should promote the cooperation of Eastern European data archives as well.

The workshop was structured in three domains of potential sharing of experience and expertise: The first domain included the five country reports. Different approaches to the establishment of an archive (at a university, academy of sciences and at a commercial institute) related to the second. The third domain was devoted to the discussion on taking advantage of the existing experience and adopt it to the circumstances in the respective countries.

The country reports showed clearly that despite the wealth of produced data there is still a lack of systematic and centralized archival and data services in Lithuania, Poland, Bulgaria Yugoslavia, and Ukraine. Often data producers function as data archives and their own data users at the same time. Access channels are extremely variable and mostly depend on informal relations. The data sharing culture (embargo policy, copyright, data protection etc.), missing co-operation between the researchers, budget short cuts and brain drain are specified as the main obstacles for the free flow of data. All rapporteurs shared the view that the inability to overcome the competition and the structure of the research funding in the countries are the main reasons for the lack of centralized data access. However it was also mentioned that there are attempts to overcome this unsatisfying situation, especially in Bulgaria, Yugoslavia and Lithuania.

The papers presented by the representatives from the data archives showed clearly that in spite of different patterns in institutional structure all data archives were facing the same problems: the chronic lack of long-term financing and trained staff. Furthermore the missing data sharing culture and the limited use of the secondary analysis are considered to be the main obstacles for the further development of the data infrastructure services in these countries.

The workshop provided a comprehensive view of the progress achieved in the field of establishing data archives in Eastern Europe but it has shown as well that there are data archives on different levels of development.

Main result of the workshop was the creation of the East European Data Archive Network (EDAN) (see Table 1). Further more all participants agreed to apply for financial support within the 6th Framework Programme of the European Union (EU).

The East European Data Archive Network (EDAN)

The creation of the EDAN was considered to be the starting point for the application to the 6th Framework Programme of the EU which will be functioning in November 2002. In comparison to former programmes the commission announced some changes regarding the application rules, the included countries and the instruments. Both representatives from EU member and candidate states as well as international European interest organizations can apply for financial support within the new programme. According to the EU proposal, the activities carried out under the heading "Structuring the European Research Area" are intended to help establish a fabric of research infrastructures of the highest level in Europe and to promote their optimum use on a European scale. "Integrated infrastructure initiatives shall combine in a single action several activities essential to reinforce and develop research infrastructures, in order to provide services at the European level. To this end, they shall combine networking activities with a support activity (such as relating to transnational access) or research activities needed to improve infrastructure performance, excluding, however, the financing of investment for new infrastructures, which can only be financed as specific support actions."⁽⁵⁾ Therefore at the workshop the establishment and operation of a cooperation network in the field of data archives in Eastern Europe was considered as a precondition for an EU application. The inclusion of the east part of Europe is very important for the creation of an infrastructure on a European scale.

Table 1: EDAN Membership (2002)

	Country	Archive/Archive Initiative	Foundation
1.	Hungary	TARKI, Budapest	1985
2.	USSR/Russia	DBSR, Moscow	1985
3.	Estonia	ESSDA, Tartu	1994
4.	Latria	LSSDA, Riga	1996
5.	Slovenia	ADP, Ljubliana	1997
6.	Czech Republic	SDA, Prague	1998
7.	Russia	VCIOM, Moscow	2001
8.	Romania	RODA, Bucharest	2001
9.	Slovakia	DAP, Bratislava	2002
10.	Ukraine	KIIS, KievKiev Taras Shevchenko University	Ongoing
11.	Yugoslavia	Center for Political Studies and Public Opinion Research at the University of Belgrade	Ongoing
12.	Lithuania	SSDA Lithuania	Ongoing
13.	Bulgaria	SSDAB, Sofia	Ongoing
14.	Poland	CBOS, Warsaw	Ongoing
15.	Macedonia	Faculty of Philosophy, University of Ss. Cyril and Methodius, Skopje	
16.	Germany	ZA Cologne	1960

The EDAN is not intended to replace or substitute the already existing networks IFDO and CESSDA. It should act as an informal network designed to unite data archives which are at an early stage of their existence and share common problems as well as to make sure that the Eastern European data archives will catch up with the advanced western data archives. For those archives, which were not formal members of CESSDA the EDAN serve as a good organizational framework to coordinate efforts for setting up the archive. CESSDA and IFDO offered to ask for support and it is intend to include UNESCO as sponsor in this network. The GESIS Branch Office/Central Archive as the German member of EDAN will serve as the coordinator of all activities concerning the network and the EU application.

At the workshop in Berlin there was also a common understanding of the fact that the Eastern European archives need special training in meta data production in the very next future. It is envisaged to organize a training seminar on DDI in Bucharest 2002 within the framework of EDAN.

4. The Structure of the book

The volume containing the revised papers originated from this international workshop is organized in the following way. Introducing the west European view on data archiving **Ekkehard Mochmann** gives some insights into the development of the data movement. The first part of this book explores the development and problems of the empirical social research in Eastern European countries without a developed infrastructure. The second part deals with the progress achieved in the existing and emerging data archives.

PART I: Country reports

The evaluation of the potential for the establishment of a data archive in Bulgaria is described by **Yantsislav Yanakiev**. Based on an expert survey he explores the main obstacles to a archive and possible ways of resolving them. He introduces a pilot project to create the Bulgarian Social Science Data Archive.

Algis Krupavicius and **Vladas Gaidys** focus on the development of empirical social science research in Lithuania and describe the wealth of produced data. They emphasize that the future social science data archive in their country has to be an inter-academic institution based on an agreement between universities and institutes of the Academy of Sciences as well as private agencies. In this respect first results are expected in the next future. Whereas **Krzystof Zagorski** and **Michal Wenzel** (Public Opinion Research Center CBOS) comment on the difficult situation confronting Polish social sciences and consider CBOS's "self declaration as a data archive" to be the only strategic option in the Poland. In the appendix of the country report **Bogdan Cichomski** provides a detailed description of the Polish General Social Survey citing it as an good example of data dissemination. The cooperation of three different research institutes in Ukraine is described by **Olha Honcharenko** and **Andriy Gorbachyk**. In cooperation with the Department of Sociology of the National University of "Kiev Mahyla Academy", the Kiev International Institute of Sociology (KIIS) and Kiev Taras Shevchenko University set up a database which made the datasets of the Kiev International Institute of Sociology publicly available. **Ljiljana Bacevic** explores the history of empirical social research in what she calls the "Second" and "Third Yugoslavia". She also describes the recent efforts undertaken by the Centre for Political Studies and Public Opinion Research at the University of Belgrade to establish a consortium of 14 leading social science research institutes for creating a national database in Yugoslavia.

PART II: Progress reports

The case studies from the Czech Republic, Estonia, Latvia, Russia and Slovakia illustrate different approaches to the creation of a data archive. **Jindrich Krejci** introduces the Sociological Data Archive in the Czech Republic (SDA) as a department of the Institute of Sociology at the Academy of Sciences in Prague. He stresses that this organizational framework guarantees the permanent funding only for the regular activities of the archive and the SDA has to keep the operational costs on a low level. **Andu Rämmer** and **Rein Murakas** from the Estonian Data Archive (ESSDA) also mention that the financial support provided by the University of Tartu enables it to offer merely basic services. **Ausma Tabuna** (Latvian Social Science Data Archive, Riga, LSSDA) reports about insufficient funding for further development of the archival service as well. First results of the data archive project launched in Russia are presented by **Ludmilla Khakulina** and **Larisa Kosova**. Supported by the FORD Foundation the Russian Center for Public Opinion Research (VCIOM) established the basics of a national data archive. The next step is to invite other Russian research institutes to join this initiative. Among others a potential partner is the Institute of Sociology at the Academy of Sciences which has been maintaining a data bank of sociological research (DBSR) since 1985. This data bank is introduced by **Nina Rostegaeva**. First results of the data archive project in Slovakia started in January 2002 are presented by **Katarina Strapcova** (Institute of Sociology at the Slovak Academy of Sciences, Bratislava). Although the idea of the establishment of a Slovak data archive is relatively new she reports on the progress concerning the compilation of a data catalogue. Katarina Strapcova stresses that the cooperation with the Czech data archive (SDA) and also with the Central Archive in Cologne (ZA) had been very useful in this respect.

The reports prepared by **Adrian Dusa** and by **Janez Stebe** are excellent examples of how to take advantage of existing experiences and adopting these to the circumstances in the respective country. **Adrian Dusa** introduces the use of the Data Documentation Initiative (DDI) by the Romanian data archive. He states on the one hand the application of this method of meta data production (study, file and variable descriptions as well as codebooks) is easy to use and the software is available on the Internet for free. This also refers to the NESTAR system which facilitates the publication of DDI codebooks on the Internet. But on the other hand he points out some technical problems which has to be solved by the provider of the system. **Janez Stebe's** report also shows his preference concerning using DDI. He provides an extremely useful analysis of some problems confronting data archives when choosing DDI.

The editors decided to include a short description of the Hungarian data archive (TARKI), the first data archive in Eastern Europe despite the fact that **Ildiko Nagy**, the representative of TARKI could not manage to join the workshop.

References:

- (1) <http://www.ifdo.org/>
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Social Science Data Archives in Eastern Europe - Some Insights into the Development of the Data Movement

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1. A short history of the data infrastructure development

In spite of early efforts by Emile Durkheim, Max Weber or even Karl Marx, empirical research was the exception in classical studies to explain social phenomena of the industrial societies up to the middle of the last century. With the success of the Gallup election predictions in the USA the representative sample survey gained high visibility as a method to collect data for empirical evidence of behavior, preferences, opinions and values of the people in democratic societies. Other data collection methods like observation, content analysis, document analysis and official statistical counts contribute to a growing empirical data base.

The creation of the Roper Center in Williamstown in 1947 was the first effort to preserve the valuable survey data for further analysis. When the first European Social Science Data Archives were founded in the sixties, Social Sciences were considered data poor and the infrastructural support for social research was lacking. Of course, there were active field research organizations in several countries and some of the academic institutes had contracted out the data collection for their research projects. Yet, there was no culture of data sharing. Frequency distributions created by counter sorters or cross tabulations by the first statistic programs were the only visible outputs of empirical projects. After all, it was a cumbersome process to Archive and ship packages with punched cards across countries and nations. So, it took a while to familiarize the scientific communities with the advantages of sharing data and using it for secondary analysis. Data exchange and repeated use of available data for new research projects intensified with the advent of statistical packages for the Social Sciences and more compact media for data transfer. Magnetic tapes or, later on, diskettes made archiving and data transfer much easier. In addition, training seminars in the use of secondary analysis and data confrontation seminars for advanced researchers demonstrated the potential for new insights and testing of published results with available data.

Scholars, who participated in those seminars or had a chance to use data provided via the archives, started to deposit their own research data and, thus, contributed to gradually spreading the culture of data sharing. Data production and the archival holdings grew, more systematic acquisition policies were implemented and transborder cooperation resulted in exchange of data processing tools and of emerging archiving and service standards.

In the late fifties there was a discussion, whether just one central archive should serve all scientific communities within Europe. Over the years, most Western democracies established their own Social Science Data Services, bearing in mind, that linguistic competence, cultural background and familiarity with the needs of the own user community were essential requirements for a good data service. By that time the Standing Committees on Comparative Research and on Social Science Data of the International Social Science Council of UNESCO inspired national initiatives to coordinate transborder cooperation.¹

The Council of European Social Science Data Archives (CESSDA) emerged from a meeting of archive directors in Amsterdam on May 31 and June 1, 1976. Broadening the perspective beyond Europe, the International Federation of Data Organizations (IFDO) was formed at a meeting in Louvain la Neuve on May 22, 1977. While CESSDA and IFDO concentrated on cooperation and data exchange between the data service institutes, IASSIST, the International Association for Social Science Information Service and Technology, promoted the field by cooperation between professionals from libraries and data archives, working in the data service field. When IFDO was created, CESSDA confined itself primarily to projects that could be better pursued within Europe, being well aware that the relatively short distances would make travel and communication between project partners much easier. It was clear from the outset, that wherever these projects would contribute to the international scientific community beyond Europe, IFDO participation would be welcome and CESSDA also would support IASSIST activities within Europe. When IFDO became associated member of the International Social Science Council the Standing Committee on Social Science Data was discontinued.

2. From cross section studies to continuous international data programs

In the sixties and early seventies there was hardly any continuous effort to systematically collect data in internationally coordinated research. Nevertheless, social research profited from a number of pioneering initiatives emphasizing a European perspective. (Civic Culture, Time Budget, USIA, Political Action, BIG- ESF)

The Eurobarometers

The Eurobarometers, conducted to inform the EU Commission, were made available to the scientific community via the social science data archives.

European and World Values Surveys 1981-1984, 1990-1993, 1999

The data of the earlier World Values Surveys were integrated and documented to facilitate cross national research by Ronald Inglehart with funding from a National Science Foundation grant. They are available via the national social science data archives. Teams in Tilburg and Cologne are working on the documentation of VS 1999, teams in Madrid and Ann Arbor are working on WVS.

The International Social Survey Programme (ISSP)

One of the most comprehensive, continuous academic survey programmes is the ISSP. The official data archive of ISSP is the ZA, which makes the integrated datasets available via the archival network. (see: http://www.gesis.org/en/data_service/issp/). Other prominent data collections are the household panel studies, the national election studies on national parliaments (coordinated by ICORE, and CSES) etc..

3. Training seminars and Summer Schools

The Standing Committee on Comparative Research of the International Social Science Council initiated a special training program for comparative research in 1970. These ISSC Summer Schools were designed for graduate students and younger staff to “help them cut their teeth on concrete analyses by opening up access to archives of data from a range of different countries” (1). These international seminars significantly contributed to the creation of an international scholarly network. To ensure a broader impact beyond the ISSC Summer Schools, four Workbooks in Comparative Analysis, including the instructional sets for data based teaching, were published (2).

4. Integrating the social research data base

In spite of growing data wealth, research with international perspective remained seriously handicapped. Consequently, the social research data base continued to lack a higher level of integration, measurement instruments; data representation formats were inspired by a lot of ingenuity with little emphasis on comparability; emerging data access and data protection regulations continued to differ, and even information about the availability of data was not always easy to obtain. So, the cross cultural comparison had to rely on ex post coordination of available data resources. Under constraints of given resources, the Social Science Data Archives had to concentrate their integration efforts on large comparative datasets and selected data collections that were repeated over time. Over the years, archival efforts focused on international experience and

recommendations for data protection and data access (Cologne 1978 and 1988), support for the first European-wide project in secondary analysis – the ESF-BIG (Beliefs in Government) Project, comparative projects like “Political Action” (3) and ongoing data collection programmes like the Eurobarometer and the ISSP.

Due to the lack of standardization, the database has to be harmonized to enrich research. This is a conceptually, technologically and methodologically demanding task. Since contemporary structures of social research are geared to national needs, these additional challenges can hardly be tackled with given resources. A promising new effort is underway with the European Social Survey (ESS).

5. Facilitating access in world wide networks

Beyond acquiring and archiving data, data archives have to verify, document and publicize the data. Accessibility and use of data will be increased by providing a set of **integrated instruments and procedures tying together the process of search for and the statistical analysis of the data desired**. Operational versions of these tools building on the Data Documentation Initiative (DDI) have been developed for mainframe and PC applications (NESSTAR, ILSES, SDA, JD Survey, ZA Codebook Explorer etc.).

Building on the available expertise, standardization efforts for cataloguing data - possibly up to the creation of an **International Dataset Number (IDSN)** – should be carried further. The study descriptions, including abstracts of contents, methodological and technical background information for the holdings of the respective archives should be easily accessible using modern communication technology for access and distribution.

Research projects based on secondary analysis, if conducted in close cooperation with the archives, can activate the existing research potential and will help adjust the infrastructure services to the needs of the data user clientele. Training seminars in how to access existing databases and in the uses of secondary analysis could supplement this process.

Given the scope of tasks, the national data archives might be supported by local or regional data service and consultancy facilities. In the past, this was an added obligation of local computing centers, with emphasis on training and consulting in data analysis. Some positive experience has been gained with a system of official representatives and with regional research laboratories or research data centers.

6. Historical context as part of the meta data management

Creating an unified comparative database was most successful in the past if guided by substantive interest. Scholars from different countries with interest in comparative research pooled their efforts to this end. As examples from election research show, it is not sufficient to have well documented national collections of the major election studies.

Familiarity with national specifics and historical events is needed to document the context knowledge necessary for proper interpretation of the results. The development of **extended knowledge systems**, covering the most relevant empirical datasets, metadata information, context knowledge, original questionnaires, actual election results, bibliographic references, graphs, tables and abstracts of publications based on the respective data, comes close to the ideal information base of social science workstations – the electronic state-of-the-art report in a multimedia world.

The experience of integrating datasets (about 400) from 25 years of empirical research in the former GDR into the holdings of the ZA emphasizes the importance of documenting context and interpretation knowledge along with the time and space coordinates of the respective study. As Umberto Eco (4) states in his theory of semantics with reference to the rise and fall of political systems, the meaning of statements or symbols can be changed up to its extreme contrary by controlling the context in which it is placed.

Notes:

- 1 This happened under the leadership of Stein Rokkan, Guido Martinotti, Warren Miller and Erwin K. Scheuch. The Amsterdam meeting followed a discussion of Cees P. Middendorp from Steinmetzarchief, Amsterdam and Hagen Stegemann from Zentralarchiv, Cologne on policies of archival cooperation and international data transfer.

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**PART I:
COUNTRY REPORTS**

Bulgaria

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1. Development of empirical social research before 1989

Bulgarian practice in empirical social research can look back on forty years of history. The first nationwide representative empirical sociological survey was carried out in 1962 on the topic of Religious affiliation of the Bulgarian Population. Since then numerous large-scale surveys have been carried out on various important topics relating to the development of Bulgarian society. These surveys include: The town and the village (1969, 1986); Social and Class Structure of Bulgarian Society (1977); Labor Realization of the Bulgarian Population (1978); The Bulgarian Family (1978); Lifestyle of the Rodopa Mountain Population (1984); Social Stratification in Bulgaria (1990), etc.

Empirical social surveys have mainly been conducted by the Institute of Sociology of the Bulgarian Academy of Sciences, the Institute of Youth Studies, the Departments of Sociology at Sofia University and the University of World and National Economics, and the Institute for Social Studies of the Bulgarian Trade Union Confederation. In addition, several research centers of the state administration were established. The research centers most actively involved in empirical social research were the Information and Sociological Center (ISC) of the Central Committee of the Bulgarian Communist Party and the Sociological Research Center of the Ministry of Defense.

In spite of tight political control over sociological research during the totalitarian period, a community of well-qualified professional scholars was formed. Sociology was also institutionalized as a science. In 1968 the Institute of Sociology of the Bulgarian Academy of Sciences (IS-BAS) was established. In 1969 Bulgarian sociologists set up their own professional organization – the Bulgarian Sociological Association (BSA). Sociology has been taught as a discipline at Sofia University and the University of World and National Economics in Sofia since 1976.

The idea of the establishment of a national sociological data or a “thesaurus of sociological information” (1) has a comparatively long history. It dates from 1982 and was conceived by the founder of Bulgarian sociology Ochavkov. (2). Later on Chakalov (3) and Dobрева (4) also discussed the importance of and the need to establish a national sociological data bank in Bulgaria.

Despite the fact that a data bank was established at the ISC, the data from most of the surveys carried out before 1989 were lost after its closure in 1990. Some printed materials still exist, for example frequency tables, cross tables and descriptions of some of the surveys carried out by the Institute of Sociology (BAS). Some of the data from the surveys of the Institute of Youth Studies, which was closed down in 1992, are also available. The people who carried out these surveys have saved about 20 SPSS system files.

2. Development of empirical social research after 1989

Main empirical social research institutions

After the democratic changes in 1989 the number of empirical social surveys in Bulgaria increased rapidly. In addition to the existing public research institutions, a large number of private sociological agencies have been established. The main empirical social research institutes in Bulgaria can now be divided into four groups.

The first group comprises **academic research and educational institutions**. Those active in empirical research include:

- The Institute of Sociology of the Bulgarian Academy of Sciences;
- The Institute of Psychology of the Bulgarian Academy of Sciences;
- The Institute of Demography of the Bulgarian Academy of Sciences;
- The Department of Sociology at Sofia University;
- The Laboratory for Sociological and Marketing Surveys at the University of World and National Economics.

The second group comprises **research institutes and centers of the state administration**, which are subordinate to the National Assembly and various ministries. The following institutes and centers are active in the field of empirical social surveys:

- National Public Opinion Center;
- Sociological Research Center of the Ministry of Defense (closed down in 2000);
- Institute for Advance Defense Research;
- Institute of Forensic Science and Criminology of the Ministry of the Interior;
- National Center for Drug Addiction.

The third group comprises **profit-making sociological and marketing agencies**. It is important to stress the fact that, since 1990, private sociological agencies have been more active in empirical research than public academic and educational institutions. They have permanent staff and most of them have built up their own network of interviewers all over the country. Despite the fact that their interests lie mainly in marketing research, advertisement monitoring and media analysis, most of the agencies conduct opinion polls as a part of regular omnibus surveys. Some of the private sociological and marketing agencies in Bulgaria are representatives of international research organizations such as Balkan British Social Surveys plc (BBSS Gallup International) and the Market Research Institute (GFK Bulgaria), a fact which makes them feel more secure on the market. There are also many other agencies which are very successful in attracting funds to conduct marketing and social research. Among the most successful agencies are Vitosha Research, the Institute for Marketing and Social Research (MBMD), the Agency for Social, Political and Marketing Research (COVA-HARIS), the Agency for Social Research and Analysis (ACCA-M), the Agency for Socio-economic Analysis (A.S.A), ALPHA Research, the Agency for Marketing and Media Analysis (MMA), the Analytical Creative Group (ACG), the Marketing Research Agency (Market Test), etc.

The fourth group comprises **non-profit-making organizations and think tanks**. Interdisciplinary research teams, who work within the framework of different Non-Governmental Organizations (NGOs), have also carried out many empirical social surveys and produced quantitative data during the last decade. Special mention must be made of NGOs such as the International Center for Minority Studies and Intercultural Relations, the Agency for Social Analyses (ASA), the Center for Liberal Strategies, etc.

Description of the main data collections produced after 1989

Data collections produced by academic social research and educational institutions

Because state funding for science in Bulgaria has been constantly declining since 1989, empirical activities in public research institutions depend mainly on the abilities of the team leaders to attract funding for empirical social research. For this reason some public educational institutions and, to some extent, academic research institutions have not been empirically active during the last decade. They have, as institutions, little data to offer for a future Social Science Data Archive (SSDA). It is common practice for small research teams of scholars in these institutions to carry out empirical surveys, most of which are funded by various international sponsors. These teams usually create the

questionnaires for the surveys, analyze data and write research reports. The interviewer network of the Institute of Sociology (BAS), the National Public Opinion Center or some private sociological agency is responsible for field work and data processing. Data files are under the control of the research team leaders.

Institute of Sociology of the Bulgarian Academy of Sciences

The Institute of Sociology of the Bulgarian Academy of Sciences is the main sociological research institution in Bulgaria. The following departments are the most actively involved in empirical surveys: Global and regional development, Methods of sociological survey and public opinion research, Sociology of deviant behavior, Sociology of religion and everyday life and Sociology of science and education.

The surveys carried out by the *Department of Regional and Global Development* focus on topics such as unemployment, crime, problems of interethnic and religious relations in Bulgaria, risks of social transformation, etc. Most of the surveys are repeated over the course of time and create ways to trace the dynamics of social transformation. Some of the surveys provide an international comparison with countries in Southeastern Europe. Among the recent surveys are the following:

- Media and Civil Society in Bulgaria 2000-2001;
- Global, Regional and National Conditions of Unemployment in Bulgaria, an international comparative survey representative of the Pernik region in Bulgaria, Lodz in Poland and Tver in Russia, funded by the UNESCO-MOST Programme, 1999-2000;
- Problems Facing Ethnosociology in Bulgaria 1996-1999;
- The Crime Wave in the Context of the Social and Economic Transition 1996-1997;
- Conditions for Stability in Social Transformations 1996;
- Innovation Processes in Education 1994-1995;
- Value-Normative and Institutional Barriers Confronting Sustainable Development 1993-1995;
- Structure and Dynamics of Risk Situations: Risks of Transition 1993;
- Social Conditions of Technological Innovation in Southern Europe 1991;
- Sustainable Development and Environmental Risk 1992.

The surveys carried out by the *Department of Methods of Sociological Survey and Public Opinion Research* are mainly connected with methodological issues. Most of the surveys are conducted on nationwide representative basis and include expert evaluations. Recent surveys conducted by the researchers in this Department include:

- Public Opinion Research – Reality, Problems and New Trends 1997 – 2000;
- Methodological Problems of Survey Activity 1995;
- Survey and Research Activity at the Institute of Sociology – Trends, Changes and Perspectives, Methodological Assessment 1994-1995;
- Sociological Surveys in the Period of Social System Changes, Interests and Behavior of Respondents, Researchers, Customers, Community – 2nd stage, 1993;
- Sociological Surveys in the Period of Social System Changes, Interests and Behavior of Respondents, Researchers, Customers, Community – 1st stage, 1992;
- Response Behavior in the Period of Social System Changes 1991-1992.

The surveys carried out by the *Department of Sociology of Deviant Behavior* focus on a broad spectrum of present issues of deviant behavior and potential conflicts in contemporary Bulgarian society with the main stress on the problems of younger generations. Some of the recent projects of the Department are:

- Political and Economic Orientations of Bulgarians – Ten Years After the Beginning of Social Change: A Comparative Study, 1990-2000;
- Bulgarian Women during the Period of Transition: Inequalities, Risks and Social Costs 1999-2000;
- Juveniles and Deviant Behavior 1995-1999;
- Trends in Youth Unemployment in Bulgaria 1994, 1996;
- Social Conflicts During the Period of Transition 1991-1994;

Following the change in the economic model of the development of Bulgarian society, the researchers from the *Department of Sociology of Labor and Social Policy* have focused their activities on issues of employment and unemployment, the labor market in Bulgaria, poverty, the role of economic elites in Bulgaria, etc. Recent surveys of the Department include:

- Labor Market Segmentation in Bulgaria 2000-2002;
- Child Labor – Ethnic Peculiarities 2000;
- Child Labor – Problems and Tendencies 1998;
- Marginalization of Bulgarian Society During the Transition 1996;
- The Economic Elite in Bulgaria 1995;
- Labor in Bulgarian Villages 1995;
- Entrepreneurship – Values & Models 1995;

- Strategies for Economic Activity 1994-1995;
- Employment and Unemployment in the Towns of Bulgaria 1994;
- Entrepreneurship – Stimuli for Activity 1994;
- Poverty – Sociological Problems 1992-1993.

The *Department of Sociology of Religion and Everyday Life* has carried out a large number of national and international comparative surveys on the integration and marginalization of the Roma population, interethnic relations in Bulgaria, the problems of specific ethno-confessional communities in the country, etc. Some of the projects completed during the last several years are:

- The Attitudes Towards Roma, international comparative study, 2001;
- Orthodox Christianity and Islam in the Structure and Development of Modernity, 2000;
- The Neighborhood of Religious Communities in Contemporary Bulgarian Society During the Period of Transition 2000;
- European Values Study 1999;
- Socio-Economic Problems of the Rhodope Population 1998-1999;
- The Rhodopes in the 1990s – Social Changes and Ethno-Religious Relations 1999;
- Poverty in Bulgaria, Ethnic Dimensions of Poverty 1998.

The research activities of the *Department of Sociology of Science and Education* focus on the role of science, education and innovations in the social transformation of Bulgarian society. Most of the surveys are carried out on a national representative basis. The Department has also carried out cross-national comparative surveys for countries in Southeastern Europe. Recent surveys include the following:

- Telematics and Communications Technology, comparative study in Bulgaria, Macedonia and Romania, which is part of a cross-national research project sponsored by the European Commission: INCO-COPERNICUS IV Programme, 1998-2000;
- Elite Language Schools and Private Schools: Modes of Socialization, nationwide surveys, sponsored by the Ministry of Education and Science and the Open Education Foundation, 1995-1997;
- Scientific Institutions in a Society of Transition: Strategies of Modernization, cross-national survey in collaboration with the Methodology Institute and the London School of Economics, sponsored by the Central European University, 1994-1996;
- Periods of Modernization of Society and Public Understanding of Science, nationwide survey, sponsored by the Ministry of Education and Science, 1945-1995;

- Scientific Organization: Strategies of Change, national survey in collaboration with Ecole des mines de Paris, sponsored by the Ministry of Education and Science, 1993;
- Public Understanding of Science, national representative survey in collaboration with the Methodology Institute and the London School of Economics, 1991-1993;
- Brain Drain in Bulgarian Science in the Early 1990s, national representative survey, 1991-1993;
- Perceptions of Justice in East and West, cross-national research project, sponsored by the National Council for Soviet and Eastern European Research, U.S. National Science Foundation, the Institute for Social Research, University of Michigan, and the National Program for Complex Investigation of Man, 1989-1992;
- Personality in the Changing Society, national survey, sponsored by the National Program for Complex Investigation of Man, 1987-1990;

The Institute of Sociology of the Bulgarian Academy of Sciences maintains a website (<http://www.ci.bas.bg/sociology>) and periodically publishes information on different research projects.

Institute of Psychology of the Bulgarian Academy of Sciences

Research teams in the Institute of Psychology of the Bulgarian Academy of Sciences (IP-BAS) have carried out several field studies and produced quantitative data from socio-psychological surveys on various topics. The projects are connected with the study of personal and situational determinants of work activities in everyday life and in extreme situations, psychological states, job stress models, tension, fatigue, working capacity and job satisfaction, as well as the interrelation between job content and psychological health. Special attention is paid to the analysis of the changes in the psychological state of people when unemployed. Furthermore, the research activities of the Institute are directed towards problems connected with verbal and non-verbal communication in face to face interaction, aggression, frustration, characteristics of social support, alienation and social chaos, normative and mass behavior. Finally, cognitive personal styles, the media influence on different audiences and cognitive strategies for political voting are also studied. Among recent projects of the IP-BAN are the following:

- Attitudes towards Further Education, longitudinal nationwide survey, carried out with the financial support of the Association of Adult Education Institutes, Germany, 1993-1999;
- The Values of the Bulgarians and Bulgarian Culture During the Transition towards Democracy, nationwide survey, carried out with the financial support of the Central European University, Budapest, and the Bulgarian National Research Fund. The surveys from 1996 and 1998 were conducted using the same methodology and the data is comparative;

- Professional Stress among Policemen and Medical Doctors, comparative survey for Bulgaria, Germany and the UK. The Bulgarian part of the research was funded by the National Research Fund, 1998-1999;
- Professional Stress among Managers, comparative survey for Bulgaria, Romania, Ukraine and the UK. The Bulgarian part of the research was also funded by the National Research Fund, 1998-1999.

The Institute of Psychology of the Bulgarian Academy of Sciences periodically publishes information about recent research projects on its website (<http://www.cl.bas.bg/psychology>).

Institute of Demography of the Bulgarian Academy of Sciences

The Institute of Demography of the Bulgarian Academy of Sciences (ID-BAS) is responsible for scientific research and forecasts on demographic development consistent with the priorities of the country and the need to formulate demographic policy. Marriage trends and the reproduction behavior of families have been studied in comparison with other European countries. The processes of demographic transition and the decrease in fertility have also been studied. Full and concise tables concerning mortality by causes for both sexes and domicile have also been compiled. Research has been conducted on early fertility in Bulgaria and the demographic behavior of specific groups of the population – ethnic groups, women in business in the private sector, families with many children, the rural population and the population in the third age.

The Institute is implementing the project “Integrated Statistics for Women” (BUL 91/PO1) in cooperation with the National Statistical Institute, and with the technical and financial support of the UN. The project is being supervised by the UN Statistical Department in order to use the product and transmit experience for the creation of data bases for women in other countries.

The Institute of Demography of the Bulgarian Academy of Sciences operates a website (<http://www.cl.bas.bg/demography>) and periodically publishes information on different research projects.

Sofia University

Empirical social surveys have been organized and carried out mainly by two faculties of Sofia University: the Faculty of Philosophy, Department of Sociology and the Faculty of Economics. In addition to teaching students, the professors from the University, as individual scholars, participate in or lead various research teams. Some of the empirical surveys relate to the education of the students and are aimed at the promotion of their practical experience in field research. Other surveys are conducted on a national representative or international comparative basis. Some of the recent surveys carried out by researchers and research teams in the Department of Sociology of Sofia University include:

- **Small Businesses: Success Models and Reasons for Failure**, international comparative survey for Bulgaria, Russia and the Czech Republic, funded by the Volkswagen Foundation, 2001-2002;
- **Economic Culture of Sole Proprietors**, international comparative survey, representative of the capitals of Bulgaria (Sofia) and Macedonia (Skopje), in cooperation with the Center for Advanced Studies, 2001-2002;
- **Social Integration of Young Roma People**, evaluation research on the social project for the integration of Roma in two regions of the country – Smoljan and Pazardzik, 2001;
- **Institutional Culture in Bulgaria**, national representative survey, carried out in cooperation with Bielefeld University, Germany. The survey is funded by the Research Support Scheme of the Open Society Foundation, 1996-1998;
- **Transformation in State-Owned Enterprises: Comparative Models in Bulgaria, Poland, Hungary and the Czech Republic**, international comparative survey in cooperation with Bielefeld University, Germany, 1996

In addition to the main educational activities, research teams and individual researchers in the *Faculty of Economics* carry out empirical surveys, most of which are national and some comparative over time. Recent surveys include:

- **Culture of Organizations in Bulgaria**, national survey representative of state-owned and private firms in Bulgaria, 2000-2001, using the methodology of Georg Hofstede, partially comparative with a pilot survey from 1997;
- **Development of Private Business in Bulgaria**, national survey representative of private firms in the country, 1997, comparative with the survey from 1991.

Department of Sociology at the University of World and National Economics

Empirical social surveys have been carried out by the Laboratory for Social and Marketing Research of the Department of Sociology since its establishment in 1987. Between 1987 and 1990 the main research activities of the Laboratory were directed towards support for students' education at the University. The scope of the surveys broadened after 1990. Between 1990 and 1993 the Laboratory carried out a series of surveys on "Privatization of State-owned Enterprises", which was representative of three regions of the country containing developed heavy industry (Sofia, Burgas and Pernik). In addition, the Laboratory carried out about 100 marketing surveys between 1993 and 1999. Since 1999 the Laboratory has carried out panel surveys among students on "Monitoring and Evaluation of Market Behavior of the University in Implementing Educational Programs". In 2000 and 2001 the Laboratory carried out a nationwide representative survey on the topic of "Bulgarian Human Capital". The survey was conducted in cooperation with the Association for Development and Applied Studies in the Social Sciences (ADRAT), Belgium.

Data collections produced by the National Statistical Institute

Within the framework of the General Data Dissemination System (GDDS) of the International Monetary Fund, the National Statistical Institute (NSI) collects and disseminates socio-demographic data on population, health, education and poverty.

Annual population estimates are derived from the decennial census (the latest one was conducted in March/April 2001) and are updated by data from administrative sources on births, deaths and migration. Data cover citizens and permanent residents. A range of demographic indicators such as birth rates, death rates, fertility rates and life expectancy are compiled. In addition, the NSI, in collaboration with the National Center for Health Informatics, collects a range of health-related statistics based on administrative records, annual censuses and special-purpose surveys. Data on education covering facilities, personnel and enrolments are collected through an annual census of all educational establishments.

The NSI conducts a monthly Household Budget Survey of 6000 households and provides data on the structure of households and persons in a household according to socio-demographic characteristics, incomes based on source, expenditure according to groups, consumption of main foodstuffs, calorific content of consumed main foods, etc. An annual Living Conditions Survey is also conducted. A detailed description of the surveys and the main publications of the Institute can be found on its website (<http://www.nsi.bg>). Some of the latest general publications of the NSI are:

- **The Statistical Yearbook of the Republic of Bulgaria.** It provides users with compound data on the demographic, social and economic development of the country during the period from 1995 to 2000. Statistical information on Bulgaria is presented in two sections: a general review and a review according to districts. The publication contains detailed statistical information on all branches of the Bulgarian economy. Separate chapters present data on geographic characteristics and the environment, population, labor, health services, education and science, culture and arts, justice, sports and tourism. Comparable data on Bulgaria and other countries are presented in a separate section.
- **The Statistical Reference Book of the Republic of Bulgaria,** which contains topical statistical information on demographic processes and socio-economic and cultural life in the Republic of Bulgaria between 1997 and 2000. This reference book is based on the National Classification of Economic Activities, which came into force at the beginning of 1997. Statistical information is presented generally for the country and according to districts. Comparable data on Bulgaria and other countries are also included.
- The bulletin **Statistical News** contains actual monthly and quarterly statistical information on the development of the country in 2001 and the corresponding period in 2000, as well as yearly data on main demographic, social and economic indicators. The presented information describes the national economy both at a macro-level and based on sectors – industry, agriculture, transport, communications and trade.

- The publication **Population and Demographic Processes 2000** contains the main results of demographic statistical surveys on births, deaths, marriages, divorces and migration of the population in 2000. Data are presented in a wide variety of classifications according to numerical and categorical variables. In a territorial aspect data are aggregated at national level as well as by districts according to the administrative territorial division of the country at December 31, 2000.
- The issue **Population 2000** contains statistical data on the number of residents in the country as a whole and in 28 districts distributed according to gender and age. Data based on the main demographic indicators in the year 2000 are also presented.
- The publication **Household Budgets in the Republic of Bulgaria** contains statistical data from the sample household budget survey for the period from 1992 to 2000. The results are grouped according to the following categories: residence, number of persons in the household, total annual income per capita, presence of pensioners in the household, professional and socio-economic characteristics of the household head, and by decile groups.
- The bulletin **Employment and Unemployment** contains the main results of a sample survey on economic activity, employment and unemployment of the population aged 15 and over. The included data describe: number and demographic characteristics of the labor force; total for the country and according to districts and regions; causes and duration of unemployment; employment and employment status.
- The publication **Local Government Authorities 2000** presents data from a comprehensive opinion survey of local government authorities in the Republic of Bulgaria at 31 March 2001. Data presented refer to information on elected municipal and mayoral councilors as well as the district, municipal and mayoral administrative staff in the country. Data on local government authority officials are distributed according to age, gender and level of education. The edition will be of interest to experts in the field of management and regional development.
- The publication **Main Macroeconomic Indicators** presents the results from the work of official statistics on the calculation of the main macro-economic indicators for Bulgaria, e.g. gross domestic product based on current prices for the period from 1980 to 2000; quarterly data on GDP and gross value added – total for the macroeconomy and the private sector for the period since 1994; main per capita aggregates for the period between 1991 and 2000; gross output, etc.

Data collections produced by research institutes and centers of the state administration

National Public Opinion Center

The National Public Opinion Center (NPOC) was founded in 1990 as a public research institute for opinion polls and is subordinate to the National Assembly of the Republic of Bulgaria as well as the BAS. To date the NPOC has carried out more than 160 nationwide opinion polls. They focus on a broad range of topics concerning problems and prospects relating to Bulgaria's transition to democracy, problems of young people in Bulgaria, confidence in the state institutions, media and political leaders, public attitudes towards Bulgarian accession to the EU and NATO, perception of corruption in Bulgarian society, etc. Among the most important surveys of the Center are the following:

- Migration Potential in Bulgaria, 2001;
- Bulgarian Youth, nationwide survey sponsored by the State Agency for Youth and Sport, 2001;
- Unemployment in Bulgaria, nationwide survey sponsored by the UNDP, 2001;
- Public Opinion towards Equal Opportunities for Men and Women in Bulgaria, 2001;
- Public Opinion towards the Main State Institutions, Political Parties and Political Leaders, EC and NATO, 2000;
- Public Opinion towards Corruption, in cooperation with the Association Transparency without Borders, 2000;
- Public Opinion towards Bulgaria's Accession in the European Union after the Helsinki Summit in 1999, 1999;
- Public Perceptions of the Kosovo Crisis, 1999;
- Ethnic Groups and Power, 1998;
- Bulgarian Youth – Problems and Perspectives, 1998;
- Study of the Reasons for Children Dropping Out from Secondary and High School, sponsored by the PHARE Program of the EU, 1997;
- Anomie in Bulgarian Society, 1996;
- Women in Politics, 1995;
- Public Opinion towards Reform of the Social Security System, 1994;

- The Bulgarians and Their Families –Problems and Perspectives, 1993;
- Public Opinion towards Privatization, 1992;
- Public Opinion on Restitution, 1992;
- Study of Bulgarian Democracy, applying the methodology of the Erasmus Foundation, Budapest, 1991;
- World Values Survey 1990;

The NPOC maintains a data bank from the surveys carried out since the establishment of the Center. Some of the results are available on its website

(<http://www.parliament.bg>).

Research Institute of Forensic Science and Criminology, Ministry of the Interior

The Institute of Forensic Science and Criminology was established as a research institution within the framework of the Ministry of the Interior in 1968 with the aim of organizing scientific research in the fields of forensic science, criminology, theory of operational and investigation activities, and management of the police force. Since the establishment of the Institute numerous empirical surveys on the prevention of economic, criminal and organized crime have been carried out. Some of the most important recent projects of the Institute include:

- Partnership Between the Police and the Media for the Prevention of Crime in Bulgaria 2001;
- Violent Crime Against Women and Children: State and Opportunities for Prevention 2000;
- Criminal Activities in Big Cities in Bulgaria and the Response of the Police 1999;
- Prevention of Drug-Related Crime in Bulgaria, expert survey, 1999;
- Privatization and Criminality, expert survey, 1999
- The Police and Private Security Firms: Opportunities for Cooperation, purposive survey among police and private security company personnel, 1997;
- Attitudes towards the Use of Arms by the Police, nationwide representative survey, 1996;
- Public Opinion towards the Police, nationwide representative survey, 1995;

The Institute maintains a data bank from the surveys and publishes some of the results from public surveys in the Bulletin of the Bulgarian Criminological Association and in the Bulletin of the Institute.

Sociological Research Center of the Ministry of Defense

The Sociological Research Center (SRC-MoD) was established in 1968 as a research institution within the framework of the Ministry of Defense. It carried out sociological surveys and opinion polls among the Bulgarian military as well as young people. Some of the projects are comparative in nature and provide an opportunity to compare perceptions and attitudes of young people in the army and their counterparts in the high schools of the country. Among the most important public projects are the following:

- Public Attitudes towards Defense and Security Policy and Integration of Bulgaria in NATO, nationwide opinion poll, sponsored by the NATO Office of Information and Press, 1999;
- Drug Use and Attitudes towards Drugs among Young Bulgarian Men, representative survey of conscript soldiers and high school students, in cooperation with the National Center for Drug Addiction, sponsored by the Research Support Scheme of the Open Society Foundation, 1997-1998;
- Bulgarian Young People under the Conditions of Social Transformation, representative survey of conscript soldiers and high school students, 1995;
- Religious Consciousness of Young People in Bulgaria, representative survey of conscript soldiers and high school students, funded by the Council of Ministers of the Republic of Bulgaria, 1994;
- HIV/AIDS – Knowledge, Attitudes, Behavior, representative surveys carried out among the Bulgarian military, conscripts, non-commissioned and commissioned officers, and expert survey of medical specialists, 1993;

After the closure of the SRC-MoD in 2000, data files are kept by the Institute for Advanced Defense Research.

Institute for Advanced Defense Research

The Institute for Advanced Defense Research (IADR) has a short history. It was established in January 2000 after the reorganization and integration of the research institutions as the only research body in the Ministry of Defense. The IADR has continued the tradition of the SRC-MoD by conducting sociological surveys and opinion polls among the military and civilians after the closure of the Center in 2000. The main projects are connected with public opinion towards defense and security policy and issues of human factors affecting the effectiveness of the Armed Forces. The projects are also of a comparative nature and some of the surveys are repeated using the same methodology. Among the recent public projects are the following:

- Public Attitudes towards the Defense and Security Policy and Integration of Bulgaria in NATO, nationwide opinion poll, conducted in cooperation with the Institute of Sociology of the BAS, 2001; 2000
- Attitudes towards Ethnic Tolerance and Cooperation in the Bulgarian Armed Forces, representative surveys carried out among the Bulgarian military, high school students and expert survey among high-ranking military and civilian leaders in the MoD, conducted in cooperation with the International Center for Minority Studies and Intercultural Relations, sponsored by the Open Society Foundation, 2000-2001;
- HIV/AIDS – Knowledge, Attitudes, Behavior, representative surveys carried out among conscript soldiers and high school students, conducted in cooperation with the Agency for Socio-economic Analyses, sponsored by the United Nations Development Program and UNAIDS, 2000 comparative with the survey of 1993.

National Center for Drug Addiction

The National Center for Drug Addiction has its own department for sociological and epidemiological research and organizes regular surveys regarding drug use and attitudes toward drugs among various risk groups with particular attention to young people. Among the recent surveys are the following

- Snowball Sampling Survey among Heroin Users in Sofia, applying the methodology of the Pompidou Group of the EU, sponsored by the Research Support Scheme, Open Society Foundation, 1997 comparative with the survey from 1995;
- Use of Cigarettes, Alcohol and Drugs by Students, representative of high school students in Bulgaria, 1995;
- Study on Drug Use among Secondary School Students in Sofia, Plovdiv, Varna and Rouse, representative of the four regions, 1994
- Use and Abuse of Psychotropic Substances by Children and Teenagers, representative of high school students in Bulgaria, 1993

Data Collections Produced by Private Market and Opinion Research Institutions

Agency for Socio-economic Analyses

The Agency for Socio-economic Analyses (A.C.A.) is a private social research and consultancy company, which was established in 1992. The focal points of the research projects are social problems of young people, social integration and disintegration, attitudes towards AIDS/HIV, sexual behavior, migration, etc. The Agency is engaged in evaluation research on the implementation of various social projects at national and regional level. Some of the recent projects include:

- Youth Forum Initiative Survey, commissioned by the UNDP, Bulgaria, 2001;
- Social Assessment of the Care of Young People in Bulgaria, three nationwide surveys, commissioned by the World Bank, 2000;
- Research on Factors in the Shadow Economy, subcontracted by the Institute for Market Economy-Bulgaria, financed by the Center for International Development at Harvard University, 2000;
- Research on the Shadow Economy in the Auto Service Sector, two nationwide surveys, financed by the Center for International Development at Harvard University, 2000;
- Situation Analyses in “Preparation of the Communication Campaign on Migration”, commissioned by the International Organization for Migration, (IOM), 1999-2000;
- Situation Analyses in “Preparation of a national strategy on HIV/AIDS in Bulgaria”, commissioned by the Ministry of Health and UNAIDS Project, 1999-2000;
- Expectations about Local Government Actions in 5 Municipalities, evaluation research by the Swiss Project Coordination Center, the Swiss Embassy in Bulgaria, 1998;
- Evaluation of Pilot Regional Information Centers on EU Integration, commissioned by the Center for European Studies, the Euro Info Correspondence Center and the EC Delegation, 1998;
- National Aspirations Surveys, sponsored by the United Nations Human Development Project, 1998-1999;
- Attitudes towards Local Government Reform, survey subcontracted by the Foundation of Local Government Reform, conducted in collaboration with the DATA Agency, 1997;
- Attitudes towards Nuclear Waste Management in Bulgaria, a PHARE project, 1996;

- The European Manager: Values and Mentality, financed by PHARE and coordinated by the University of Oxford, 1994-1996;
- The Bulgarian Manager: Values and Mentality, a research project, financed by the Friedrich Naumann Foundation – Bulgaria, 1993.

Analytical Creative Group

The Analytical Creative Group (ACG) Ltd. was established as a private sociological and marketing agency in 1997. The focal points of its research are environmental and nature conservation issues. Among the recent projects are:

- Wetlands Restoration and Pollution Reduction – Environmental and Social Assessment, sponsored by the World Bank & MOEW, 2001
- Persina Nature Park, Kalimok-Brashlen Protected Site, 2001;
- Socio-economic Surveys for Preparing Management Plans for Rila Monastery Nature Park ARD GEF Biodiversity Project, sponsored by USAID, 2000-2001;
- Rila Monastery Nature Park, socio-economic research program in support of management plans for the Rila NP and Central Balkan National Park, 2000;
- Rila National Park, Central Balkan National Park, ARD GEF Biodiversity Project, sponsored by USAID, 2000;
- Socio-economic Assessment of the Feasibility of Establishing a Network of Visitors Centers in Bourgas Wetlands and Strandja Nature Park, sponsored by the Bulgarian Swiss Biodiversity Conservation Program, 1999;
- Public Attitudes towards Biodiversity Conservation, ARD GEF Biodiversity Project, sponsored by USAID, 1997;

The ACG has also coordinated a research project, which was sponsored by the IOM, on trafficking in women in 1997, 1999, and 2000.

Agency for Social Research and Analysis

The Agency for Social Research and Analysis (ACCA-M) was established as a private sociological and marketing agency in 1993. The Agency pays particular attention to social problems of young people in Bulgaria (aged 16 to 35). The key research topics are as follows:

- Attitudes towards Emigration;
- Youth Employment and Unemployment;
- Religious Consciousness of Young People in Bulgaria;

- Anomie in Bulgarian Society, part of an international comparative survey, 1997-1999;
- Reproductive Behavior and the Use of Contraceptives, sponsored by the PHARE programme of the EU, nationwide survey from 1996-1998.

Alpha Research Ltd.

Alpha Research Ltd. is a private, independent full-service research agency. The Agency monitors the socio-political attitudes and expectations in Bulgarian society and analyzes the most significant trends. This activity is implemented on the basis of monthly national representative surveys. Among the major trends which are being monitored are the following:

- Attitudes towards public institutions, political parties and their leaders;
- Public attitudes towards the accession of Bulgaria to the European Union and NATO;
- Evaluation of the reform processes in various areas;
- The economic situation in the country and the individual standard of living;
- *Income levels: the current situation and future expectations;*
- Technical provisioning of Bulgarian households and cultural consumption.

In addition to these general trends, the Agency conducts empirical surveys on a number of topical social and economic issues such as changes in the educational system, the adoption of the Law on Child Welfare, the health care habits of the population, NGO participation, economic activity of Bulgarian households, etc. Alpha Research Ltd. publishes some of the results from opinion polls on its website (<http://www.aresearch.org>).

Balkan British Social Surveys plc

Balkan British Social Surveys plc (BBSS Gallup) was founded in 1991 as a privately owned company. It is now one of the biggest private market, media and opinion research organizations in Bulgaria. Through affiliate and joint venture companies based in Romania, Albania, Macedonia, the Federal Republic of Yugoslavia, Serbia and Montenegro, Bosnia & Herzegovina, and the Ukraine, BBSS-Gallup focuses on multi-country research and consultancy services in Southeastern and Central Europe. BBSS-Gallup maintains a data archive from the surveys and publishes data and descriptions of the projects on its website (<http://www.gallup-bbss.com>)

Institute for Marketing and Social Surveys

The Institute for Marketing and Social Surveys Research (MBMD) is a private social research institution which was founded in 1991. Surveys are conducted on a national and regional basis. The main topics of opinion polls are:

- Rating of politicians and confidence in public institutions;
- Electoral attitudes and electoral behavior;
- Reforms in the health care system;
- Public attitudes towards privatization,
- Public attitudes towards corruption;
- National identity.

In addition, the Institute carries out media research and monitors media audiences at national, regional and local level. Some recent opinion polls carried out in 2000 and 2001 focused on the following topics:

- Expectations about the situation in Bulgaria;
- Confidence in politicians;
- Slogans of different parties effecting voting attitudes;
- Electoral attitudes, confidence in the national movement “Simeon II” and in the other political parties;
- Confidence in the Bulgarian institutions and media;
- Desire of the Bulgarians to live and work in EU countries.

The Institute maintains a data archive from the surveys and provides online access to some data from the latest surveys on its website

(<http://www.mbmdresearch.hypermark.net>).

Market Test

Market Test was established in 1995 as a private company for research and consulting. Market Test carries out qualitative studies with the aim of in-depth exploration of consumer insights and motivations, advertising research, business-to-business marketing research, media audience research as well as quantitative social studies. Special mention must be made of continuous surveys carried out by the company in which the targets are the major media audience, TV, press and radio. These surveys include a nationwide diary panel which is representative of Bulgarian households and the population over the age of 16. Self-administered questionnaires are completed on a daily basis. Data

are provided in specially designed software for media analysis and planning (MAS 3.0.) The quantitative surveys carried out by the company focus on the diagnosis of social problems, attitudes towards specific social issues, testing of social reform concepts, evaluations of social projects as well as measurement of the effectiveness of PR campaigns. Market Test also has resources and experience in conducting research in neighboring countries such as Macedonia, Serbia and Albania. The Agency maintains a data archive from the surveys and provides online access to some data from opinion polls on its website (<http://www.mtest.bol.bg>).

GfK Bulgaria

GfK Bulgaria is a full-service market research institute. The company was set up in 1994 as a subsidiary of the GfK Group. It supplies data from ad hoc studies and consumer scans, household panels, etc. Its main research areas are:

- Research on consumer goods;
- Research on consumer durables;
- Media research ;
- Research on advertising;
- Social and political research;
- Financial research;
- Medical and pharmaceutical research;
- Research on leisure time, tourism, traffic and automobiles;
- Social styles in Central and Eastern Europe;

The project “Social styles” offers access to qualitative and quantitative data, expertise on every aspect of day-to-day life, panel information: it can be linked with consumer panels of GfK Bulgaria to refer to contacts and relevancy between diversity of lifestyles and merchandising data. The information provided comes from the regular GfK Bulgaria Omnibus surveys. Some recent results from the opinion polls are available on the website of the Institute (<http://www.gfk.bg>).

Vitosha Research

Vitosha Research is the social and marketing research unit affiliated to the Center for the Study of Democracy (CSD). The Sociological Program started operating shortly after the establishment of the CSD. In 1990 it conducted the first independent pre- and post election surveys after the democratic changes in Bulgaria. Vitosha Research was

launched at the end of 1994 to develop new work orientations for the Sociological Program of CSD and to deepen its concentration in the field of market research. Together with other research agencies from Central and Eastern Europe, Vitosha Research won a European Commission grant competition and started the implementation of an international survey entitled “Eurobarometer”, which is being coordinated by Gallup Hungary. It is being carried out in 13 applicant countries for EU membership. The first poll was conducted in January 2000 and the second one in October 2001. Its main purpose is to collect information about expectations of the respondents about the improvement in their living standards, the general attitudes of the Bulgarian public towards EU, as well as public opinion and assessments of the process of European integration in Bulgaria. In 2001 Vitosha Research launched an “E-living Survey” with the aim of identifying the level of development of new information and communication technologies among the Bulgarian population. The survey is part of a major project that is taking place in different European countries. Another project launched by Vitosha Research was devoted to the assessment of the development of information technologies in Bulgaria. The project was conducted between July and October 2001. The main objective of the project is to assess the current state of the infrastructure and services of the information technology sector in Bulgaria.

Some of the recent surveys of Vitosha Research were implemented within the framework of the following projects:

- **Elites and the Changes in Bulgaria.** The survey is part of a long-term international project, which started in 1984, and is aimed at studying the opinion of Bulgarian elites on social change in the country.
- **International Social Justice Project.** It which includes the development, implementation and analysis of data gathered through a common survey questionnaire in Bulgaria, the Czech Republic, Estonia, Germany, Hungary and Russia. The first stage of the project was completed in 1991. The second stage of the project started in 1995 and the surveys were conducted in October 1996 (Public Perceptions of Social Justice – December 1996; At-Risk Groups and Social Policy Challenges in Bulgarian Society – 1994-1995).
- **Early Warning System in Bulgaria.** It explores the possibility of anticipating and responding to crisis situations before they become too violent or mitigating their effects once underway. Early warning reporting develops predictive capabilities and enhances informed judgments about possible sequences of events and outcomes.

- **Corruption Assessment.** The basic responsibility of Vitosha Research within the *Coalition 2000* initiative has been the development and the implementation of the Corruption Monitoring System (CMS) of the coalition. The CMS includes a system of empirical studies and analytical reports. The first quantitative and qualitative surveys of the CMS were conducted between July and September 1998. Numerous nationwide and cross-national surveys were carried out as part of this project: Regional Corruption Monitoring in Albania, Bosnia and Herzegovina, Bulgaria, Croatia, Macedonia, Romania, and Yugoslavia 2000; Corruption Indexes, Results from the Comparative Survey in Albania, Bulgaria, and Macedonia February 2000; Corruption Indexes of Coalition 2000, February, April, September, November 2000; Corruption indices of Coalition 2000, September 1999; Corruption indices of Coalition 2000, Public Sector Employees April 1999; Corruption indices of Coalition 2000, April 1999; Corruption indices of Coalition 2000, February 1999; Business and Corruption Indexes, 1998; Attitudes of Bulgarians towards Corruption, March, 1997 - September, 1997; Public Bureaucracy and Corruption - May 1998; Perceptions of Corruption - April 1997.

Vitosha Research maintains a data archive from the surveys and publishes some data from the surveys and descriptions of the projects carried out between 1994 and 2000 on its website (<http://www.online.bg/vr>).

Agency for Social, Political and Marketing Research

The Agency for Social, Political and Marketing Research (SOVA-HARIS) was established in 1995 as a private commercial firm specializing in political and marketing research as well as opinion polls. The Agency carries out monthly omnibus surveys on the following topics: rating of the main state institutions, political parties and leaders as well as trade unions; dynamics of electoral attitudes; national security and geopolitical attitudes; material status and well-being. Some of the main topics of recent empirical surveys are:

- The State of Bulgarian Sport, nationwide representative opinion poll, 2001;
- Bulgarian Youth – Problems and Prospects, nationwide representative survey, 2001;
- The Reform in the Health Care System in Bulgaria, nationwide representative opinion poll and survey among medical doctors and patients in the 28 regional centers in Bulgaria, 2001;
- Women in Business, purposive survey among women entrepreneurs, 2000;
- Telecommunication Services in Bulgaria, nationwide representative survey, 2001
- Public Opinion towards the Ozone Layer and its State, nationwide representative survey, May and September, 1999;

Some of the results from recent opinion polls are available on the website of the SOVA-HARIS Agency (<http://www.socaharris.com>).

Marketing Media Analysis

The agency Marketing Media Analysis (MMA) was established in 2000 as a private firm whose main interests are media research, advertisement monitoring and analysis, marketing research and sociological research. The main topics in its sociological research are lifestyle and social stratification, political marketing, attitudes towards responsible health behavior and prevention, etc. The Agency has conducted two Multi-Client Projects:

- Tweens® (Teenagers and Twenty-Something, representative of young people aged between 12 and 25). This is a unique international project of Public Consultants with the goal of exploring the motivation of youth behavior in several countries in Europe, Asia and America. MMA is responsible for data collection, data processing and analysis for Bulgaria.
- WOMENTALITY. In this program the Agency analyses the content and the main characteristics of several women's magazines in order to explore the context for marketing research and advertisement monitoring.

The website of MMA (<http://www.mma.bg>) provides information on the main projects of the Agency and some data from the latest surveys.

Data collections produced by non-governmental organizations and think tanks

International Center for Minority Studies and Intercultural Relations

The International Center for Minority Studies and Intercultural Relations (IMIR) was founded in 1992 as a private, non-political, non-profit-making and non-governmental organization. Major IMIR research projects in history, anthropology, sociology, interdisciplinary studies and Balkan Studies in 2001 and 2002 are the following:

- Integration of Ethnic and Religious Minorities in the Armed Forces of the Republic of Bulgaria: Problems and Solutions. The project was carried out in cooperation with the Institute for Advanced Defense Research and comprises nationwide representative surveys as well as surveys among the military, 2000-2001;
- The Ethno-Cultural Situation in Bulgaria, this started in 1995 and will continue in 2002. This involves annual sociological and anthropological monitoring of relations among Bulgaria's ethnic and religious communities in the context of the ongoing political processes, economic crisis, social upheaval and the regional and international situation;

- The New Minorities in Bulgaria, this project started with an anthropological and sociological field study in October 2001 and will continue until mid-2002. The purpose is to study and describe immigrants who have settled permanently in Bulgaria in recent years, as well as those people whose children are now second- or third-generation immigrants: their motives for choosing Bulgaria, their traditions and customs, level of adaptation in their new home country, nostalgia for their homeland and their social, economic, political and public status;
- State of the Roma Community in Bulgaria after 12 Years of Transition to a Market Economy. This survey is part of an international research project on human development of the Roma in five Central and Eastern European countries, which was launched in October 2001 and will continue in 2002;
- Formation of European Consciousness among the Younger Generations in Bulgaria, 1997-1998;
- Relations of Compatibility and Incompatibility between Christians and Muslims in Bulgaria, 1995.

IMIR's research projects in anthropology, history, sociology and other social sciences are generally published in book form in the specialized IMIR Series. In addition the Center publishes some of the results on its website (<http://www.einet.bg/~imir>).

Agency for Social Analyses

The Agency for Social Analyses (ASA) is an independent, non-profit-making, public-policy-oriented think-tank founded in 1994. The ASA is a member of the International Social Survey Programme (ISSP) and carries out the surveys in the framework of the Programme in Bulgaria. The Agency has realized over 20 projects on behalf of various public and private bodies, including central and local government, trade unions, companies and foundations. These projects include:

- Social Assistance in Bulgaria, research component of social marketing, commissioned and supported by the World Bank through the Ministry of Labor and Social Policy, 1999-2000;
- ISSP 2000 Environment II, supported by the Confederation of Independent Trade Unions in Bulgaria;
- ISSP 1998 Religion II: Religious Minorities in Bulgaria 1999, supported by the Open Society Fund and the Tolerance Foundation;
- ISSP 1999 Social Inequality III: Social Stratification and Inequality 1999, supported by the Confederation of Independent Trade Unions in Bulgaria;
- Women in Poverty, national survey commissioned and supported by the UNDP, ILO and MOLSP with the main aim of helping to strengthen anti-poverty strategies of the Bulgarian government, 1997;

- ISSP 1997 Work Orientations II: Work Orientation 1997, supported by the Open Society Fund;
- ISSP 1996 Role of Government III: Role of Government in Democratization 1997, supported by the Open Society Fund;
- Investment Climate in Bulgaria, research project commissioned and supported by the Agency for Foreign Investment with the main aim of helping to improve the investment policy of the Bulgarian government, 1996;
- ISSP 1995 National Identity I: National and Ethnic Identity and Consciousness 1995, supported by the Friedrich Ebert Foundation;
- ISSP 1994 Family and Changing Gender Roles II: Women, Work and the Family 1995, supported by the Open Society Fund and the Friedrich Ebert Foundation;
- Working and Living Environment, survey, supported by the TU Federation Metalici Kremikovtzy, Ltd., with the aim of improving the company's policy, 1994;
- ISSP 1993 Environment I: Environment 1994, supported by the Ministry of Environment and the Open Society Fund;
- ISSP 1992 Social Inequality II: Social Inequality 1993, conducted and supported by the Open Society Fund, 1993.

The Agency for Social Analyses maintains a data bank from the surveys and publishes some of the results on its website (<http://www.asa-bg.netfirms.com>).

Center for Liberal Strategies

The Center for Liberal Strategies (CLS) was established in Bulgaria in 1994 as a foundation and a think tank. Some recent projects of the Center are:

- Measuring Balkan Public Agenda. This is a project aimed at measuring the public agenda in the Balkans as something different from the agenda of the elites. The means here are regular sociological surveys using the same questionnaire and conducted at the same time throughout the region, 2001-2002;
- Political and Economical Orientations of the People in Post-Communist Countries in Southeastern Europe 2001, international comparative survey (Bulgaria, Macedonia, Montenegro and Serbia) funded by the German Marshall Fund of the U.S. and the Civic Education Project;
- Political and Economical Orientations of the Bulgarians. Ten Years after the Social Transformation 2000, nationwide representative survey;

The website of the CLS (<http://www.cls-sofia.org>) provides detailed information on the research projects and the publications of the Center.

Summary: Current practice of empirical social research in Bulgaria

An analysis of recent practice in the field of empirical social surveys in Bulgaria reveals that three main issues merit particular attention when the possibilities of setting up a social science data archive are analyzed. These are the scope of the surveys, the methodology and data processing and archiving. When analyzing these issues, we will rely on the results from an expert survey carried out among the heads of 17 public and private sociological research institutions in Bulgaria by the Institute of Sociology in 1999 and 2000 (5).

The first issue concerns the **scope of the empirical social surveys**. In this dimension we can distinguish a different territorial scope and different target groups. According to the territorial scope, social surveys carried out by various actors in Bulgaria during the last decade have been based on international comparisons, nationwide representative samples, regions (representative of one or more main administrative regions in the country) and local areas. The main target groups are the adult population of the country, households, young people, the military, mass media audiences, the press, etc.

The second issue concerns the **methodology of the surveys**. With regard to the sampling methodology, nationwide representative samples are most often used by the research institutions to carry out sociological surveys and opinion polls. The sample size varies between 1000 and 1300 respondents. The sample model is realized as a rule in two stages (two-stage nested sample). The second stage is formed on the basis of the next birthday principle as well as the Leslie Kish method. The estimation of maximum stochastic error is usually reported to be $\pm 3\%$ for 50% relative frequency with 95% probability. Some of the private agencies frequently apply quota sampling methodology as well as typological sampling depending on the purposes of the surveys. (6). With respect to data collection methods, standardized face-to-face interviews are most often used by Bulgarian sociological research institutions. Self-administered questionnaires are rated as the second preferred data collection method. Researchers try to use unified modules (batteries of questions) in the surveys in order to meet the requirements for comparability of the results and to analyze the trends in the development of public attitudes over the course of time. Depending on the goals of the survey, a variety of data collection methods such as telephone interviews, in-depth interviews, focus groups, etc., are used (7).

The third issue concerns **data processing and data archiving**. SPSS software is most often used for data processing and statistical analysis of survey results. Some of the biggest private sociological agencies such as BBSS Gallup use their own software for data processing. All of the research institutions report that they have established their own data bank. The data are usually stored and kept in SPSS format. (8)

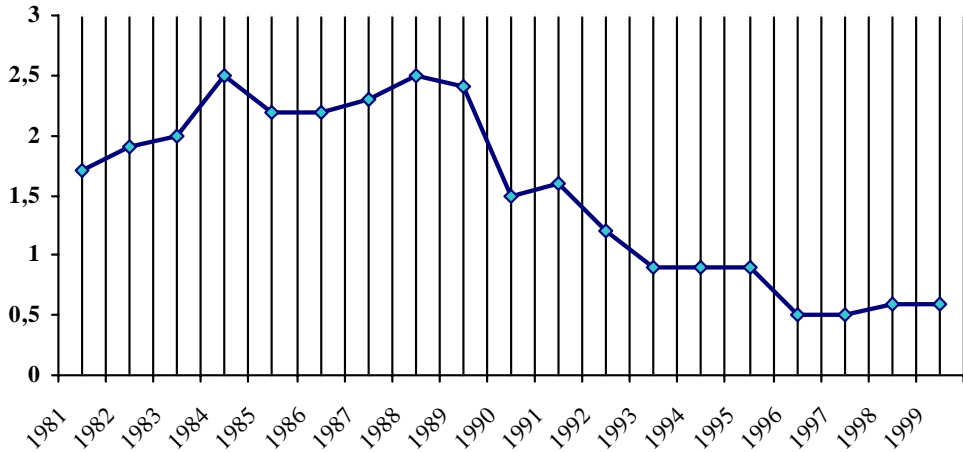
3. Regulations concerning data access

There are no legal regulations concerning access to data from social surveys and opinion polls in Bulgaria. The professional community has also not agreed any joint regulations for data access. Data files normally come under the control of the research teams. Data access, as a common practice, has to be negotiated with the team leaders or with the heads of the institutions that have carried out the surveys. Since most of the empirical surveys result from projects funded by foreign donors, data are under temporary or permanent embargo. As far as data confidentiality and maintenance of secrecy are concerned, the Law on Statistics regulates this process in the Republic of Bulgaria. Confidentiality of reporting is guaranteed under Chapter 6. According to Art. 25 (9), individual and personal data received may be used solely for statistical purposes. Data on individual reporters can only be provided to third parties if written permission has been received. In addition, Article 26 states that the bodies of statistics and their servants cannot make public or provide: individual statistical data; statistical data which may be combined in a way that leads to the identification of an individual person; and statistical data that summarize information for less than three units or in which the relative part of one unit is over 75 per cent of the total volume.

4. Funding situation of empirical social research in Bulgaria

The main sources of funding for empirical social surveys in Bulgaria come from International Organizations, foreign NGOs, foundations, universities, media, private firms and, to a small extent, from the national budget. The funding available for the development of science in Bulgaria has tended to decline over the last 20 years. One of the main indicators which describes this process is the share of Research and Development (R&D) expenditure in GDP (see Figure 1).

Figure 1: *Research and Development expenditure in GDP in Bulgaria (1981- 1999) in %*



In 1984 there was the highest R&D intensity in Bulgaria, i.e. 2.5%. This indicator has clearly declined since 1990. In recent years R&D intensity has remained roughly stable at around 0.5% per annum. (10) Despite these very limited funds, empirical social surveys have been financed by the National Science Fund at the Ministry of Education and Science. Bulgarian researchers have also managed to attract funds for empirical surveys from the budgets of some state institutions such as the administration of the President, National Assembly and the Council of Ministers. Important sources of funding for social research in Bulgaria include various programs of the European Union, World Bank, UNESCO, UNDP, UNAIDS, UNICEF, NATO, Open Society Foundation, as well as foreign media. Bulgarian newspapers, magazines, private firms and some NGOs are also among the institutions that primarily commission and finance empirical social surveys in the country. Various political parties in Bulgaria primarily commission opinion polls, particularly during pre-election campaigns. Some of the private agencies like BBSS Gallup International, GFK Bulgaria and Vitosha Research work primarily with foreign mass media such as the BBC, The Voice of America and Radio Free Europe.

5. Assessment of the potential for establishing a National Social Science Data Archive and some views on further development

In this paragraph, we will briefly describe some positive developments and problems concerning the prospects for the establishment of a Social Science Data Archive in Bulgaria.

Most of the researchers, especially in the academic sphere, clearly understand the fact that data from sociological surveys are not analyzed and used thoroughly by the sociological community or decision-makers. There are many reasons for this situation, but the most important ones include difficult and unregulated data access, a lack of willingness to exchange data and information among the research institutions, significant data losses, etc.

On the other hand, there is a growing need for secondary data analysis from social surveys and opinion polls for educational purposes as well as the development of theoretical and methodological research. Potential users will be academic and educational institutions in Bulgaria and abroad, various NGOs, think tanks, etc. The results from the 1999-2000 expert survey shows that both the heads of public research institutions and private sociological agencies recommend improving information exchange and enhancing the role of the Institute of Sociology in this process. They think that the Institute should pay particular attention to the issues of methodology and organization of surveys, data exchange and the provision of data from the surveys available for secondary analysis. They also said that they would support the establishment of a National Data Archive. (11) This is a good starting point for the promotion of the idea to set up a social science data archive in Bulgaria. Existing data banks in the NPOC, in most of the private firms, data collections in different research departments of the Institute of Sociology, Departments of sociology at the Universities and IADR, could also be regarded as potential sources in this respect. At the same time there are some important problems that are worthy of discussion. The main problems can be summarized in four dimensions: organizational, psychological, financial and methodological.

Organizational problems

At least five organizational issues deserve attention when discussing the possibilities of setting up a social science data archive and potential cooperation between institutions involved in social research.

The first issue concerns the problem of **ownership of data**. This problem arises in two situations: firstly when foreign partners, Bulgarian NGOs or private firms finance the survey; secondly when a political party finances a survey. In both cases data access is very difficult and even impossible because the owner of the data places an embargo on the data. Another problem is that political parties normally want to publish that part of the data which shows it in a positive light.

The second issue concerns the **institutional framework** of a future social science data archive. This issue is very difficult to handle and could produce some tension because of hidden competition between the academic research and educational institutions as well as between public and private opinion poll institutes. One possible decision is to promote the idea in some of the research committees of the BSA or in a NGO with the specific goal of establishing and maintaining a data archive.

The third issue concerns the **technology used in the surveys**. Since omnibus surveys (marketing and opinion polls using a single questionnaire) are a common practice in Bulgaria, the data have to be divided in two parts. The first part contains the data from marketing research, which are usually confidential, and the second part contains the data from opinion polls, which could be stored in the archive.

The fourth important issue is the **lack of documentation** of the surveys, and particularly the fact that most of the questionnaires, description of data files, etc. are written in Bulgarian.

The fifth major organizational problem is the **lack of training**, which must also be taken into account as regards the possible establishment of a social science data archive in Bulgaria.

The financial problems, which are common to all Eastern European countries during the transition period, are well-known. The problems relating to the funding and equipping of a future social science data archive are probably the most difficult to be solved in the context of the current economic situation in Bulgaria. In this respect, it is not realistic to rely on the budget of any research institution in the country.

Psychological problems

The main psychological problems are the lack of a data sharing culture in Bulgaria and a lack of tradition in this respect. In addition, most of the researchers are reluctant to publicize data from their surveys because they do not believe that the data will be interpreted professionally.

Methodological problems

In spite of the common topics in most of the sociological research and opinion polls carried out in Bulgaria during the last decade, it is still difficult to carry out a correct comparative analysis of the results. Along with difficult data access, important problems include different wording in the questionnaires, different sampling and data collection methods, as well as a lack of information about the “cuisine” of the surveys. Some of the researchers are very sensitive on the last issue and are not willing to share information, especially about the definition of surveyed entities, the sampling model and size, the percentage of stochastic error, the percentage of “don’t knows”, etc. (12) Since some experience and archive initiatives already exist in Bulgaria, the prospects for establishing a social science data archive can be regarded as more optimistic than several years ago. The process will take at least 2 years, bearing in mind the current financial, organizational and psychological problems described above. Therefore, it is high time to launch a pilot project with the following objectives:

To increase researchers’ awareness and understanding of the importance of setting up a Social Science Data Archive in Bulgaria.

To provide researchers with data from international comparative surveys for secondary analysis and thus help promote a data sharing culture in Bulgaria.

To assess current problems and possibilities for consolidation and integration of social science data as well as identify prospects for cooperation among Bulgarian social research institutions.

To define common criteria for data storage in the archive and regulations for data access.

To promote international cooperation and the exchange of experience in social science data archiving, and particularly in standards for data documentation, training of personnel, motivation of researchers to deposit data in the archive and guarantees of copyright of the authors.

There are several steps or main activities that have to be undertaken in this respect. They can be summarized as follows:

- Desk research on the experience of Central and Eastern European Countries in the establishment of Social Science Data Archives;
- Needs assessment - expert survey among the main actors in the field of social empirical research in Bulgaria as well as among the expected main users of data for secondary analysis;
- Specialized training of two Bulgarian experts in social science data archiving in the Central Archive for Empirical Social Research in Cologne, Germany;
- Establishment of an Information and Data Dissemination Center and equipping of two workstations with computers and other office technology for secondary data analysis;

- Establishment of a social science data bank from international surveys in which Bulgaria has taken part and provision of data for secondary analysis by Bulgarian researchers;
- Creation of a systematic index of existing data files and thematic cataloguing of surveys carried out in Bulgaria during the last decade;
- Translation into English of questionnaires, codebooks, etc. with the emphasis on recent surveys carried out in the last two to three years;
- Design and creation of a website and the provision of means for online analysis of data from recent surveys;
- Print out and dissemination of information materials about the opportunities for secondary data analysis provided by the archive;
- Development of a course on secondary data analysis for students in sociology at Sofia University;
- National Workshop with international participation to discuss the problems and prospects for consolidation and integration of sociological data in Bulgaria and the establishment of a Social Science Data Archive.

The process of establishment of the Bulgarian Social Science Data Archive should be based on a gradual and snowball approach. The first step should consolidate state-financed surveys and international surveys in which Bulgaria has taken part and which were carried out by academic research and educational institutions as well as the research centers of the state administration. The next step should incorporate surveys carried out by research teams in different non-profit-making organizations. The third step should include sociological surveys and opinion polls carried out by commercial research firms.

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Lithuania

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1. Introductory remarks

According to *The Concise Oxford Dictionary*, the category of “science” may have several connotations. “Science” might be defined as a *branch of knowledge conducted on objective principles involving the systematized observation of and experiment with phenomena*, or as *systemic and formulated knowledge*.⁽¹⁾ The latter definition effectively describes social science in so far as an experiment has very limited use in this field. However, even in social sciences, data come into two types, i.e. quantitative and qualitative data. Moreover, there has been a clear trend towards gradual “quantification” of social science research over the last hundred years. This is true in particular in mainstream disciplines of social sciences - economics, sociology, psychology and political science. Looking from the overall perspective of political science, this trend has been manifested in a shift from narrative, descriptive and qualitative analysis to empirical, quantitative and comparative research, especially during the last 30 to 40 years after Downs’ *An Economic Theory of Democracy* (2). All this means that empirical data have a new value as a primary source of social inquiry in all social science disciplines.

Descriptive and inferential statistics, univariate and multivariate analysis, and econometric methods have now become standard instruments of research even in disciplines such as political or educational science, which were traditionally unfriendly to quantitative methodology. It would be hard to imagine that early classical proponents of political science as a discipline, e.g. Wilson, Weber, Pareto, Michels, Ostrogorski or even Meriam and Laswell, who largely initiated the shift towards quantification in political science, would rely on numerical measurements or “number-crunching” in order to conceptualize political phenomena. Inductive and deductive argumentation and logical positivism are now at least partially changed by various statistical procedures, including scalability and cluster, factor and regression analyses. Certainly, the division into quantitative and qualitative “schools” is a fact of life within the political research community. In 1996 Robert E. Goodin and Hans-Dieter Klingemann observed several sciences of politics in the *New Handbook of Political Science*.⁽³⁾ Recently, Paul Pennings, Hans Keman and Jan Kleinnijenhuis defined political science as “an empirical science. Its (political science – the authors) inspiration may well hinge on philosophies of the good world, or on doomsday prophecies, but more or less irrefutable facts constitute its basis. The relevant facts can be gathered from different sources” (4).

Is the main task of social science to define and collect “relevant facts” from “reliable sources” in order to achieve three main purposes of research - exploration, description and explanation of social phenomena? After reading the famous text by King, Keohane and Verba (5) on social inquiry and uncertain conclusions, nobody in social science can be so sure and self-confident as they might have been before. In this context it is worth remembering the words of Benjamin Disraeli, who once said “there are three kinds of lies – lies, damned lies, and statistics”(6). However, scientists love to extrapolate and exaggerate in order to understand complex reality and create an explanatory framework. In all the thoughts on a quantitative and qualitative divide in social sciences, and in political science in particular, this trend towards reductionism can be seen to some extent. The general trend in social sciences towards the hybridization of disciplines also means increasing “travel” in both the concepts and methodology of research. Division and integration seem to be almost the permanent status within and between disciplines in social sciences. In 1990 Gabriel A. Almond described the situation within the political science community as “sitting at separate tables”. Six years later he changed his mind slightly by saying that political science “is pluralism in method and approach, but it is eclectic and synergistic, rather than isolative” (7). A development towards more empirical, quantitative and comparative research in all social sciences is clearly a major integrative force at a methodological level.

Empiricism, quantification and comparativism are three key words in contemporary social sciences and they produce a *raison d'être* for enormous empirical data consumption. The first things which come to mind when we hear phrases such as “empirical data” or “data archive” are definitely various collections of quantitative data, ranging from public opinion surveys to perhaps national census data. Our thoughts on empirical data are also associated with various institutions which collect and store data in different Western countries, for example the International Consortium for Political and Social Research (ICPSR) in the U.S., the German Social Sciences Infrastructure Services (GESIS) in Germany, the Norwegian Social Science Data Archive (NSD), etc.

The situation in Eastern European countries is almost completely different since social science data archives, as a necessary element of science infrastructure, are almost non-existent there or are still in the early phases of development. In many cases in Eastern Europe empirical data for social sciences are still available through various widely dispersed institutions and/or through individual contacts. This difference is certainly not due to the non-existence of empirical social science or empirical data sets, but rather because of a lack of legal and institutional arrangements and funding capacities (sometimes because of a lack of vision and leadership, too), which promote a permanent process of social data archiving as well as access to this data by a broad community of social scientists within different countries and from abroad according to clear and transparent rules. Lithuania is no exception to this rule. Moreover, Lithuania is lagging behind such countries as Slovenia, the Czech Republic, Hungary, Estonia and Romania,

which already possess the basic structures of social science data archives. Slow developments in the area of social science data archives in Eastern Europe need to be considered in terms of a few major variables in order to achieve change and formulate adequate solutions or policy decisions. In order to evaluate the situation in Lithuania, our primary tasks are as follows:

- To examine the current situation in two social science disciplines, i.e. sociology and political science, with regard to the content and availability of empirical data collections in each field;
- To evaluate an institutional infrastructure within and across the disciplines;
- To discuss problems and prospects in this area with the objective of outlining major elements of a comprehensive strategy which would cover not only legal and institutional requirements, but also funding issues and international cooperation in order to establish and maintain social science data archives in Lithuania.

Our final introductory remark concerns the meaning of “empirical” in contemporary social sciences. Concise dictionaries contain at least a few connotations of the term “empirical”, i.e. as *based or acting on observation or experiment, not a theory or deriving knowledge from experience alone*. Seen from the aspect of common sense, empiricism is usually related to the exploration and description of facts. Empirical data in social science have nearly always been associated solely with quantitative data or numerical data that can be measured. However, this is only one side of the coin. The current shift to quantification and methodological sophistication in social sciences means that some types of previously qualitative, especially textual, data are opening up to quantitative measurement. One example of this is content analysis of texts, where findings may not come only in a textual or qualitative form, but also in quantitative forms. In fact, new methodologies mean that the ability of social science to measure the data has increased enormously. The understanding of empirical data collection therefore needs to be broadened to include some areas of qualitative data.

2. Empirical research in Lithuania up until 1990: a historical overview in the fields of sociology and political science

Before 1990 empirical sociological research was concentrated at the Lithuanian Institute of Philosophy, Sociology and Law of the Academy of Sciences and at the University of Vilnius. The main fields of systematic survey research were sociology of work, time budget studies, sociology of youth, family, education and culture.

Empirical sociological studies in Lithuania were first initiated in the mid-1960s. In 1965 the Sociological Research Laboratory was established at the University of Vilnius. In 1966 the Institute of Economics of the Lithuanian Academy of Sciences organized a group of sociologists. In 1969 this group was reorganized into the Department of

Philosophy, Sociology and Law (renamed the Institute in 1977) at the Institute of History of the Academy of Sciences. These and some other groups conducted empirical sociological research. At that time empirical sociology was a synonym for sociology in general. The main directions of empirical research are mentioned below.

Industrial and work sociology: Problems relating to the functioning of enterprises, work effectiveness and job satisfaction were studied. Empirical studies were carried out in many enterprises. In 1984-1985 the Institute of Philosophy, Sociology and Law conducted a sociological study entitled "Satisfaction at work". 35 enterprises were included in this survey and 4,800 workers and 520 engineers were interviewed. Since 1978 sociological studies have been conducted in all the largest industrial enterprises in Lithuania.

Time budget studies: The main task of these surveys was to analyze the way of life in different social groups and trends in time usage. Researchers from the Kaunas University of Technology, which at that time was known as the Polytechnic Institute of Kaunas, were mainly responsible for conducting the largest surveys in 1972, 1974, 1982 and 1988 (more than a thousand respondents each year).

Sociology of youth: One of the most important longitudinal projects for the sociologists started in 1983 and ran for ten years. The study was based on surveys of young people who had finished different kinds of school in 1983. The life paths, lifestyles, values and attitudes of young people were analyzed. This study was conducted in all Baltic countries and 11 former regions of the USSR according to a standard program and method. The International Sociological Association and Stanford University (USA) provided the methodology and financial support for the survey.

Political science only has a short history as an academic discipline in Lithuania since it was not formally recognized until the late part of 1988. In the fall of 1988 an open discussion on the status and teaching of ideological academic subjects (History of the CPSU and Scientific Communism) was started in Vilnius. The leader and chairman of this discussion was R. Pavilionis in his then capacity as Head of the Department of History of Philosophy, University of Vilnius.

The Ministry of Higher Education established a working group on the reform of the social sciences in Lithuania in the fall of 1988. The working group approved a decision, in principle, to introduce political science in the curricula of academic institutions. However, Lithuanian universities were granted the right to choose the contents and teaching intensity of political science. From this moment on responsibility for the reform of the social sciences was transferred to the governing bodies of universities and their social science departments.

Political science in Lithuania matured rapidly due to several factors. The first factor was the exchange of ideas through seminars and visiting lectures by western colleagues at Lithuanian universities; especially active were professors of politics from the United States, for example J. Smulkstys, A. Shtromas, T. Remeikis, R. Mills and S. Vanagunas,

and E. Jahn (Germany). In 1991 Lithuanian American professors established the Lithuanian Political Science Network in the U.S. with the aim of helping Lithuania's universities with textbooks and advice on organizing political studies in the most efficient way. Secondly, support for the development of political science was forthcoming from international organizations and programs such as the EU's TEMPUS scheme, the Civic Education Project, the Soros Foundation, the Fullbright Foundation and other foundations, as well as individual universities in Western Europe, especially in Denmark, Sweden and Norway. However, empirical research during the formative years of political science was not a focal point of Lithuanian political scientists.

3. Empirical research and empirical data collections after 1990: institutions, areas and holdings

Both before and after 1990 the main holder of empirical social and economic data in Lithuania was the Department of Statistics, which comes under the auspices of the Cabinet of Ministers. In 2002 the Department of Statistics issued a list of almost 30 different areas for statistical and econometric studies. Data will be collected and analyzed in areas such as population censuses, demography, employment, the labor force, households, health and social care, industry, agriculture and domestic and foreign trade. The Lithuanian Law on Statistics, which was adopted by Seimas in 1993, stipulates that one of the main priorities of the Department of Statistics is to provide statistical information to central and local government, research institutions, EUROSTAT and other international organizations according to international agreements. The methodology of statistical data collection by the Department of Statistics improved significantly after 1990. After the 2001 Population Census all the social, demographic and regional statistics are fully compatible with EU standards. Other areas of statistical data collection are also expected to comply with EU standards and regulations at the latest by January 1, 2004, the deadline for the completion of Lithuania's preparations for joining the European Union. Despite legal provisions on easy access to statistical data stocks of the Department of Statistics by Lithuanian researchers, these data holdings are not widely used in social research for secondary analysis due to various material, technical and even psychological reasons. The development of a social science data archive could lead to closer interaction between social scientists and institutions of official statistics.

Institutionalization of empirical sociological research after 1990

Sociology

After 1990 far-reaching changes occurred in society, which also had an effect on the research sector. On the one hand, there was a substantial decrease in demand for research related to industrial development (for instance in physics or mathematics). In the field of the social sciences, exactly the opposite process had occurred: demand for sociologists had increased at universities; studies started on new topics which had been banned in the past (politics, religion, inter-ethnic relations). Western scientists and politicians closely monitored problems during the transitional period and they needed the empirical data; state institutions, political parties and non-governmental organizations also wanted to know the real situation in society. Many European and especially Eastern Central European projects were carried out in Lithuania.

Up until 1990 empirical research in Lithuania was concentrated at the *Institute of Philosophy, Sociology and Law (The Academy of Sciences)* and at the *University of Vilnius*. Decentralization took place after this date. A structural and institutional framework for empirical social research was not rigorously defined, and it is continuously changing. It is worth noting that the execution (field work) of empirical research has been concentrated in three private companies (public opinion and market research) and at the Department of Statistics. Small-scale projects (expert studies, for example) are implemented by the analytical centers of the social sciences themselves. There are constant problems in that unprofessional companies appear from time to time and claim to provide empirical research (which is of a poor quality) at a lower price. However, this issue primarily affects public opinion research.

The main centers of social research are:

- the Lithuanian Institute of Philosophy and Sociology (Department of Social Organization, Department of Ethno-sociology, Department of Research of Social Changes, Demographic Research Center);
- the University of Vilnius (Department of Sociology, Department of Social Work, Institute of International Relations and Political Science);
- Kaunas University of Technology (Policy and Public Administration Institute, Institute of Educational Studies);
- Vytautas Magnus University (Department of Sociology).

In Lithuania there also are some NGOs conducting projects based on empirical data, e.g. the Lithuanian Free Market Institute and the Lithuanian Human Rights Center.

Political science

Political science cannot hope to compete against sociology in terms of the scale and scope of provision of empirical data for secondary analysis in any country, not to mention Lithuania, where political studies only have a contemporary history of 12 years. However, there are a number of political science institutions in Lithuania, which are actively carrying out empirical research (see table 1).

The *Institute of International Relations and Political Science (IIRPS)*, University of Vilnius, is the most important political science organization. The Institute was founded on February 7, 1992 as the Institute of International Relations and was relatively unaffected by remnants of the past. On November 26, 1992 the Institute was renamed as the IIRPS.

The *Policy and Public Administration Institute of Kaunas University of Technology (PPAI)* is an even younger institution than the IIRPS in Vilnius since it was only established in 1999. In 2001 it contained the Department of Law, the Department of Public Administration, the Department of Sociology, the Center for Public Policy Research and the Municipal Training Center.

The next center of political studies and research in Lithuania is of course the *Institute of Political Science and Diplomacy, including the Department of Political Science, at Vytautas Magnus University in Kaunas*. Political studies had a rather novel start in Kaunas between 1990 and 1992 because the subject was based exclusively on visiting scholars from Western countries. The *Department of Sociology and Political Science* developed good connections with Linköping University (Sweden) and the University of Bergen (Norway), and many politics lecturers came to this university through the Civic Education Project (CEP), together with visiting Lithuanian American professors in politics.

The *Department of Political Science at the University of Klaipėda* was founded in 1992 as the Department of Sociology and Political Science. In 1995, however, it was reorganized into two separate departments of sociology and political science respectively. The story of political studies in Klaipėda actually started in 1992 when a bachelor's degree in politics was introduced. Since 1996 the Department has offered MA degree studies with majors in political theory and public administration.

In addition to the above-mentioned leading institutions in political science, there are a few other minor departments at the University of Law (Vilnius), the Military Academy, Vilnius Technical University etc. The years between 1990 and 1995 could be termed a period of research identity formation in Lithuanian political science. The main research areas during this period included:

- political science as a discipline;
- political history of Lithuania and its institutions;

- democracy and democratization from a comparative perspective;
- development of democratic political culture and political parties;
- electoral processes in Lithuania;
- Baltic security and foreign policy.

Concentration on the above-mentioned topics was a good reflection of the actual research agenda of the Institute of International Relations and Political Science between 1993 and 1995. The major research projects at this Institute included studies on Governmental Changes and Prospects for Democracy in Lithuania (supported by the NATO Democratic Institution Fellowship, 1993-1994), Lithuanian Political Culture (Friedrich Naumann Foundation, 1994-1995), Lithuanian Party System (1994-1997), Lithuanian Security and Foreign Policy (1995-1999). Since 1996 the priorities of IIRPS have increased, at least in two relatively new areas, i.e. political elite research and studies of Lithuania's integration into the EU. The IIRPS has conducted the following major research projects since 1996: Lithuanian Political Elite Research (1996-1997) and Lithuanian Integration into the EU (1997-2000).

Table 1: *Lithuanian Political Science Institutions (April 2000)*

Institution	Number of						
	Staff				Students		
	Professors	Associate Professors	Lecturers	Researchers	Under-graduate	Graduate	Ph.D.
University of Law, Vilnius Department of Political Science		5	2		120 ¹	105 ¹	
Kaunas University of Technology, Policy and Public Administration Institute	2	7	2	1	50 ¹	28 ² 58 ³	6 ² 3 ³
Military Academy, Vilnius Department of Political Science		1	2		150 ¹		
University of Klaipeda, Department of Political Science		5	1		53	17	
University of Vilnius, Institute of International Relations and Political Science	3	18	15	3	365	86	15
Vilnius Pedagogical University, Department of Political Science and Sociology		3	2		100 ¹	15	
Vilnius Technical University, Department of Humanities and Social Sciences	1	3	2				
Vytautas Magnus University, Department of Political Science	1	5 ⁴	2		155	11	
Total:	7	47	28	4	993	320	24

Notes:

- 1 Number of students in introductory political science courses.
- 2 Number of students in sociology courses.
- 3 Number of students in public administration courses.
- 4 Three of them part-time.

Because of the faculty's history, the Policy and Public Administration Institute of Kaunas University of Technology has been predominantly oriented toward public policy research. However, major research priorities of this institute cover three fields: public administration, political science and sociology. Research in political science here is based on a comparative approach and includes the following topics: Governmental institutions and history of Lithuania; Elections and electoral systems; Political parties and party systems; Political elite and political transformations; Political socialization. Moreover, some research topics that belong formally to the areas of public administration and sociology are closely connected to political science, e.g. Citizens' participation in governance, Sociology of community development and public participation.

The major research priorities of the Department of Political Sciences at the University of Klaipeda were concentrated on the modern political resources of Lithuania with special emphasis on regional politics.

Research at the *Institute of Political Science and Diplomacy* (Vytautas Magnus University) might be characterized as extremely eclectic since it covered fields ranging from local government to EU studies and research on ethnic minorities to political parties.

In the case of emerging academic disciplines, every new academic field needs some period of time to become professional. Looking from the perspective of empirical political research, there are at least four different types of obstacle, which the emerging discipline needs to overcome. *Firstly*, the organization of studies and writing or/and translating of textbooks takes priority over the development of research identities and research projects. *Secondly*, the lack of human resources with experience in empirical political research, starting with research design and knowledge of quantitative methodology, was a marked characteristic of emerging Lithuanian political science¹. As a result of this, quantitative political research was almost non-existent in Lithuania until the 1990s. *Thirdly*, there is no tradition of a discipline as the development of original empirical data collections for secondary analysis takes time. *Fourthly*, a comparison of research projects shows that internal and external donors provided much more generous support for the development of a curriculum and courses. In addition, western scholars ran major research projects in which researchers from Eastern Europe played the role of data providers, but data were collected and supplied to western universities and institutions. However, the additional benefit of this partnership, which may appear unequal at first glance, was that Eastern European researchers acquired expertise in designing and conducting research from western colleagues.

One basic result is the slow development of empirical data collections within the area of political science. Major fields, which might encourage empirical research and secondary analysis of data, for example comparative politics, political sociology or political economics, are still rather underdeveloped.

Methodological sophistication and the variety of theoretical approaches are a reflection of the maturity of a discipline as well as a good predictor of empirical data use in political research. A survey in spring 2000 of the most popular theoretical approaches within eight institutions in the country in political science showed that the historical approach is still the most popular. However, behaviorism, functionalism and system theory are in second, third and fourth places respectively. Neo-institutionalism is a theoretical approach that is almost as equally popular as the three others mentioned above. Minor approaches include organizational and rational choice theories, hermeneutics and phenomenology. Marxism is certainly the rejected approach, but the Lithuanian political science community still does not accept two other approaches, i.e. game theory and existentialism. Unfortunately, there are no data on the use of quantitative methods in political studies. Nevertheless, simple observations of current trends lead us to conclude that, in the late 1990s, political research based on the quantitative technique is expanding more rapidly than ever, but that it still does not play a dominant role in dealing with political phenomena and political data. These findings confirm that most political research up until recently in Lithuania was conducted by methods which required more qualitative than quantitative data.

However, there are a number of empirical research areas ranging from public opinion surveys and electoral studies through to household and labor force surveys where extensive empirical data sets are available for secondary analysis. These data sets are continuously updated with new data.

Areas and Holdings

Public opinion research

The first public opinion surveys in Lithuania were conducted in 1989. During twelve years of radical reforms society has changed to an unrecognizable extent. The functions of public opinion as an institution have also changed; and there have been shifts in the relationship between public opinion and power (as a natural opponent). This transition can basically be divided into five periods.

Vox populi – vox dei (1989-1990). During the “velvet revolution” public opinion played a strange role. It was one of the most important factors at the start of reforms. The newly emerging political elite used public opinion as an instrument to consolidate its positions. It seemed that the principle of “vox populi – vox dei” would be in force forever.

Vox populi – vox stultorum (voice of people – voice of stupidity) (1991-1992). The new institutionalized power changed its attitude towards public opinion quite quickly. A characteristic feature of this period was the arrogance of power: “parliament is public opinion in pure form”, public opinion is incompetent and reactionary in many cases.

Distrust of methodology (1993-1996). One western polling company caused some considerable harm to the reputation of public opinion polls during the 1992 parliamentary election exit poll. The result was totally wrong. During this period classical reasons of distrust also played an important role: “one thousand respondents can not represent all the population”, “respondents do not tell the truth”, etc.

Public opinion as an adviser in decision-making (1997-1998). A closely predicted result of the parliamentary elections and promises of a new power to listen to the voice of the general public increased the number of orders for public opinion polls from state institutions considerably. A great deal of information was not published in the media: experts analyzed this information before making decisions. The state institutions engaged specialists who were able to analyze the results of sample surveys in a professional manner.

Direct democracy? (1999+). A diminishing reputation of the power structures paved the way for the use of public opinion polls as a final argument in making important decisions: a change in the time zone, administrative division of Lithuania’s territory, resignation of the Prime Minister, etc. In 2001 the results of the public opinion survey were used as an argument in a trial case before the Constitutional Court.

In 2001 there were three public opinion research companies which had a stable network of interviewers, conducted regular surveys and published results: Baltic Surveys, Vilmorus and Center of Social Information. These companies have accumulated the results of surveys carried out over many years on party preferences, trust in institutions, evaluation of the economic situation and many other ad hoc surveys.

Electoral research

Free and fair elections were not only an instrument through which democracy was installed in Lithuania after 1988, electoral studies also became an area through which empirical studies and empirical data collections were introduced in political research. The agenda of electoral research has tended to change considerably since 1990 because of various circumstances. From approximately 1992 onwards the electoral research agenda was gradually widened to include such items as party identities, electoral campaign analysis (mainly through studies of the printed media), voting behavior, parliamentary and government elites and party programs. Nowadays only one important item - a roll-call analysis - is missing in electoral research in Lithuania. The body of empirical data relating to elections is also rather impressive. Since 1992 empirical data have been collected from pre-election and post-election surveys for all parliamentary, presidential and local elections. However, these surveys were conducted by different survey agencies and questionnaires are not fully compatible. Voting statistics have been available since the 1996 Seimas elections and are accessible online (<http://www.lrs.lt/rinkimai>), including candidates’ biographies and data from their financial declarations.

Table 2: *Main electoral research and electoral data centres in Lithuania, 2000*

Institution	General area of interest	Data collections
The Baltic Surveys	Survey research	Pre-election and post-election survey data; World Values Survey data
Vilmorus LTD.	Survey research	Pre-election and post-election survey data; New Baltic Barometer
Center of Social Information	Survey research	Pre-election and post-election survey data only since 1996; Mass media analysis.
Institute of International Relations and Political Science, University of Vilnius	General electoral research	Lithuanian Political Culture, 1994; 2000; Elite survey data.
Policy and Public Administration Institute, Kaunas University of Technology	General electoral research	Data on parliamentary elites (since 1990) and government elites (since 1998); Elite survey data; Lithuanian party manifestos since 1990.
Department of Political Science, University of Klaipeda	Research on local elections	
Central Electoral Commission	Management and publication of official electoral data	Electoral statistics since 1992; Electoral system and election laws; Candidates' biographies.

Political party research

At the very beginning, most research in the field of political parties was mainly exploratory and descriptive because of the formation of a competitive party system in Lithuania. Since 1992 the Department of Information and Analysis (Lithuanian Seimas) led by A. Lukošaitis has been collecting background data (leadership, some organizational features, party finances, etc.) on Lithuanian parties. Lithuanian party manifestos and other party documents for secondary analysis are mainly available from three institutions: the Policy and Public Administration Institute (Kaunas University of Technology), the Institute of International Relations and Political Science (University of Vilnius) and the Department of Information and Analysis (Lithuanian Seimas).

A few other methods were used in studies on Lithuanian parties and they helped to develop some empirical data sets, i.e. measurement of the left-right positions of parties by means of expert scales, voter scales and party manifesto scales. The recent focus in party research has been the development of party organizations.

Party preferences in Lithuania have been studied on a continuous basis since 1990. At present there are some quite extensive data archives on these issues. The data are regularly published in the mass media and are now also available on the Internet (<http://www.5ci.lt/ratings>). The research on this topic increases significantly before elections, although only a small part of the findings are published: political parties normally commission this research and the data remain their property. More in-depth studies

(they could be called “political culture”: interest, knowledge, participation in political activities; methods of political activities, etc.) are rarely conducted and are usually financed by foreign foundations (in 1994 financed by the Friedrich Naumann Foundation, in 1999 and 2001 Sodertorus Hogskola).

Elite studies

During the transition period studies of the Lithuanian political and economic elite had vital diagnostic and prognostic functions. Elite studies were started in Lithuania almost immediately after the initial elections in 1990 when the old elite was largely replaced by a new post-communist leadership. Elite formation was an initial topic in these studies, which were mainly conducted by analyzing biographies. Biographies were the main source of empirical data collections in the early phases of elite research. Surveys of elite attitudes and orientations only began around the mid-1990s. In particular, special attention was paid to studies on elite values. Two major surveys were conducted by K. Masiulis (University of Vilnius) with the emphasis on the “power” elite, i.e. including respondents from the political, business and media elite (five surveys were conducted between 1993 and 1995 by the Lithuanian Free Market Institute) and I. Matonyte (Kaunas University of Technology) with the emphasis on the business elite (in 1996 – 260 respondents; in 2000 – 180 respondents) (9).

Analysis of institutions

The main body of empirical data is collected on Cabinets of Ministers and the parliamentary elite in Lithuania. The data on the Cabinets, which include the structure of the government, political experience of ministers, as well as social and demographic characteristics of individual ministers, cover the period between 1918 and 2001. An extensive data set on the structure and membership of parliamentary committees and parliamentary factions is available from the Department of Information and Analysis (Lithuanian Seimas).

Interest group studies

Empirical research on interest intermediation did not become part of the agenda of Lithuanian political scientists until 1997. The first in-depth survey of interest groups was only conducted in spring 1997. Organizational features and links with central and local government were among the variables in this survey. Several new surveys were conducted on interest groups in 1999 and 2000.

International relations, foreign policy and EU studies

International relations and foreign policy issues are barely operationalized for empirical research. In this case surveys are almost the only useful instrument for reflecting changes in attitudes. However, an extensive body of empirical data has been collected here on attitudes of Lithuanian citizens towards European integration issues as well as attitudes towards neighboring countries.

Attitudes towards Lithuania's accession to the EU

The first in-depth research on Lithuanians' attitudes towards European integration was carried out in 1992 (INRA, field work: Vilmorus). Regular public opinion surveys on this issue began in 1997 and by the fall of 2001 about 40 data files had been accumulated (in different time points). Comprehensive empirical studies were conducted in November 1999, April and November 2000, and February 2001. The arguments "for" and "against" Lithuania's accession to the EU, inhabitants' awareness level and peculiarities of attitudes in various social demographic groups were studied. Surveys were ordered by the Delegation of the European Commission to Lithuania and the European Committee of the Lithuanian Government. The data have been widely disseminated; the data archive is available on the Internet (<http://www.euro.lt>).

Inter-ethnic relations and identity

In Lithuania the largest proportion of the inhabitants are Lithuanians – 82%, Russians – about 8%, Poles – about 7%. Most of the Russians arrived in Lithuania after the Second World War. Although most of them have adapted well to post-independence realities, older Russians have a poor grasp of the Lithuanian language and are nostalgic for the Soviet past. Poles are local dwellers in Lithuania – most of them live in Eastern Lithuania and Vilnius. Poles living in Lithuania are faced with problems such as a lower standard of education and employment in the agricultural sector, which suffered a great deal during the reform process.

Such studies were not conducted during the Soviet period. Following the restoration of independence, some studies were conducted regarding inter-ethnic relations. It can even be said that this aspect was retraceable in most of the empirical studies.

A major in-depth study was conducted in 1999 when 100 Lithuanians, 100 Russians, 100 Poles, 100 Jews, 100 Tartars, 100 Roma and 100 respondents of other ethnic groups were interviewed. The main objective of this project was to understand the peculiarities of adaptation of ethnic groups in Lithuania. The Lithuanian Institute of Philosophy and Sociology carried out this research.

Studies on sub-ethnic groups in Lithuania have also been carried out. The problems of the identity of sub-ethnic groups are an important factor when creating natural historically emerged economic and cultural regions.

Society in Transition

The New Baltic Barometer is one of the most comprehensive empirical projects conducted in Lithuania. The first wave of the project was carried out in 1993, followed by subsequent waves in 1995, 1996, 2000 and 2001 (field work: Vilmorus). In each wave not less than 1000 respondents were interviewed. A booster sampling procedure was executed in order to analyze the data of Russian speakers separately (after the main survey an additional number of Russian speakers were interviewed in order to achieve at least 200 interviews in this group). (10)

In the survey questionnaire there were over 150 indicators concerning political and economic preferences, attitudes towards the Soviet past, inter-ethnic relations, everyday economic life, etc. These studies were also carried out in other Central and Eastern European countries (The New Democracies Barometer). The summary results were published in a series of Studies in Public Policy by the University of Strathclyde and are available for secondary analysis on the Internet (<http://www.cspp.strath.ac.uk>).

Value studies

Shifts of values in various social groups attract special attention in a rapidly changing society. This kind of information has both a theoretical and practical value as regards forecasting. The largest studies on values were carried out in 1990 (n=1020) and 1999 (n=1018). The conceptual work and data analysis were carried out by the Institute of Culture and Art (field work: Baltic Surveys). This study was conducted in many European countries, which means that it is possible to analyze the cultural differences among countries in various regions.

Regional and urban development

Lithuania's sociologists have been working in this field for several decades. One relatively new problem in this area since 1992 has been the question of closing down the Ignalina nuclear power plant as an unspoken condition of Lithuania's entry into the European Union. The closure of the Ignalina nuclear power plant will affect a whole region in Northeast Lithuania where regular empirical surveys are conducted by the Lithuanian Institute of Philosophy and Sociology. The research topics include the local residents' attitudes towards existing and potential problems; prospects for the development of small and medium-sized businesses; the language situation since this area is heavily populated by Russians, etc.

The quality of life has been studied in separate cities: Vilnius (1992), Kaunas (1996). The Lithuanian Institute of Philosophy and Sociology conducted these studies.

In 1990 a major project entitled “New Democracy and Local Government” started. Expert surveys among members of 22 municipal councils and employees were carried out in 1991, 1995, 1999 and 2001. In each wave approx. 330 experts were interviewed. At regional level a culture of management has been researched. The Institute of Philosophy and Sociology and Kaunas University of Technology are implementing the project.

Demography: social dimension

Demographers mostly use data from the Department of Statistics (birth rate, mortality rate, migration, etc.), although empirical sample surveys are necessary for research on many problems. The main center for these studies is the Demographic Research Center.

Illegal migration

Every year hundreds of cases of illegal migration are identified in Lithuania. Most of the immigrants usually come from various countries in Asia, but the final migration destinations are Germany and other western European countries. There are not many people willing to stay in Lithuania.

Research on this topic was carried out by IOM (International Organization of Migration) with the collaboration of the University of Vilnius and the Institute of Philosophy and Sociology. Empirical surveys (polls of illegal migrants) were conducted in 1996 and 2000 (n=124 in-depth interviews).

Family and birth rate

In 1995 the Demographic Research Center under the Lithuanian Institute of Philosophy and Sociology conducted one of the largest empirical studies in Lithuania (field work: Baltic Surveys). As many as 3000 women and 2000 men were interviewed in total (aged 18 to 49). Biographical events in the respondents' lives were fixed: learning, leaving the parental home, working experience, establishment of a family, birth of children, migration. These life events were fixed both from time and spatial aspects: place of occurrence, housing conditions. Values and attitudes were also researched. This research on life paths led to the compilation of comprehensive information on the evolution of the family as a social institution during the past few decades. This study was part of the international project initiated by the Population Activities Unit of the United Nations Economic Commission for Europe. In 2001 the project was repeated on a smaller scale (n=1400).

Household Budget Surveys

Since 1996 the Department of Statistics has been conducting household budget surveys which comply with the main requirements of EUROSTAT. The aim of the surveys is to obtain reliable data on the incomes of households, the structure of expenditure, living conditions and information which is needed to define price indexes. Ad hoc questions are also included in these surveys (for example about computers and use of the Internet). The subject under investigation in these surveys is a household. Households are selected using a random sampling method from the population register. Two methods of collecting information are combined: face-to-face and self-registration. 670 households are surveyed over a period of one month and total numbers reach more than 8,000 over the course of a year. 84 interviewers and 12 supervisors are engaged in the surveys. The results are published regularly.

Labor force surveys

Since 1994 the Department of Statistics has been conducting employment and unemployment sample surveys (target group: people aged 15 and over). In 2000 two surveys were conducted (approx. 8000 respondents in each). The level of unemployment is higher compared with other official sources of statistics.

Media research

Baltic Surveys began media research on a regular basis in 1997. In 1998 another company – CSI/Gallup Media – also began activity in this sphere. At present the following commercial products are available: permanent TV/radio audience surveys based on the diary method (Baltic Surveys); TV meters – minute by minute TV ratings, coverage, share, etc. (CSI/Gallup Media); press audience survey twice a year (Baltic Surveys); quarterly national readership surveys (CSI/Gallup Media); kids' media audience twice a year (Baltic Surveys); businessmen media audience twice a year (Baltic Surveys); regional media surveys (CSI/Gallup Media).

Other empirical data sources in Lithuanian social sciences

The size and availability of empirical data sets in various fields of social sciences depend on various circumstances. First of all, it is a profile of a discipline as such. Whereas sociology and economics rely a great deal on empirical data, political science is much less oriented towards empirical tradition in spite of a general trend towards empiricism and econometrization in contemporary social sciences. Another explanatory variable is the history of certain discipline, because history is related to a state-of-the-art.

Institutional development and the size of academic community matter here, too. Last but not least, leadership, vision and the intensity of international links may lead to an increase or decrease in the development of empirical data sets in various social science disciplines.

Looking together at the three major disciplines of social science (economics, sociology and political science) sources of empirical data can be classified in a few groups:

1. Data collected by various international organizations such as EBRD, IMF, World Bank, OECD, etc., i.e. mainly social and economic data.
2. Data from various international projects such as World Value Studies, New Baltic Barometer, which mainly represent changes in attitudes and values.
3. Many social and economic data sets from national governmental institutions such as the Department of Statistics, official statistics institutions, which are supposed to implement government policy in the area of statistical data collection, and Ministries of Finance, Labor and Social Affairs, etc.
4. Data collected purely for research purposes by universities and other academic institutions.
5. Empirical data for specific reasons and the purposes of private companies, NGOs.

4. Methods and methodology of empirical research

Studies started decentralizing in Lithuania after 1990: they were conducted by universities, state institutes, private research companies, NGOs, etc. The key directions of empirical research were political and party preferences, elite studies, attitudes towards Lithuania's accession to the EU, society in transition, inter-ethnic relations, value studies, regional and urban development, and demography. Public opinion surveys comprise a separate field of empirical studies which are carried out regularly by several public opinion and market research companies. A substantial data archive (statistical and based on representative sample surveys) has been accumulated by the Department of Statistics. Regular mass media surveys are another potentially important source of social data.

No representative opinion polls were conducted up until 1990. It is not very easy to explain this fact, because there were many topics which could have been researched without strong ideological control: family problems, leisure, culture, etc. It can be assumed that there was a cautious attitude towards representative polls due to two main reasons. Firstly, there was a fear that the representative polls might disclose the data on the age structure of males (which was kept secret) – military troops potential, certain professions, etc. A substantial part of data from the population census (which was carried out once every ten years and was definitely representative) were intended for “office use” only. The second reason is perhaps less rational. A random survey includes interviews in respondents' dwellings. According to Soviet ideology, a private

dwelling was somehow not very “progressive” and was difficult to control. “Non-progressive” people might have been included in personal interviews. Moreover, if interviewers were able to start walking through dwellings, the dissidents might have appeared among them (to agitate, collect information, etc.).

Up until 1990 polls were typically conducted in offices, enterprises, schools, institutes and other places of work.

The first representative surveys in Lithuania were carried out in 1989. They were public opinion polls. Public opinion and market research centers were the “enterprises” conducting representative surveys. Such enterprises have a steady network of professionally trained and controlled interviewers. There are three private companies possessing a steady network of interviewers: Baltic Surveys, Center of Social Information and Vilmorus. These companies also conduct surveys commissioned by social science institutions.

One basis of representative surveys is multi-stage, random sampling. The sampling models were prepared with the assistance of specialists from the USA, the UK and other countries.

At present the level of refusal to participate in interviews is about 20% in Lithuania. About 20% of respondents are not found at home after the second visit. These factors slightly distort the structure of a sample compared with the real social demographic structure. The data could be weighted using census data. However, the last census from which the data could be used was carried out in 1989. This means that the data are very old. The last census in Lithuania was carried out in 2001, but its data will only be available at the end of 2002.

Representative surveys are very expensive. Social sciences institutions are rarely able to attract financial resources for such surveys from state institutions or abroad. Many surveys conducted by social science institutions are based on volunteer work provided by students, teachers and sociologists themselves. Such information is quite often absent in methodological reports. Moreover, the methodical descriptions of surveys are normally not comprehensive enough. Nevertheless, the majority of representative sample surveys conform to the standards established by the European Society for Opinion and Marketing Research (ESOMAR) and the World Association for Public Opinion Research (WAPOR).

Although the problem of the quality of research is being discussed continuously, it can be said that Lithuania does not currently possess a really important social database. This is due to the data owners’ lack of interest in sharing information and the costs of creating the databases. This problem is being tackled in Lithuania though, and there are grounds for assuming that it will eventually be solved in the future.

On the other hand, social science representatives lacking resources for quantitative research attempt to compensate when employing qualitative research. For instance, fewer interviews are carried out, but they are more encompassing and often in-depth.

5. Prospects for empirical social science data archives: problems and next steps

The question of the creation of data archives has arisen ever since the first empirical sociological surveys. However, this did not appear feasible even in the centralized Soviet system. Well-organized databases are not available at present due to several reasons.

1. **Copyrights and psychology:** Although various institutions, funds, etc. finance empirical surveys, the scientists conducting empirical studies are unwilling to share information with other people. Psychologically, this information becomes their property. Nobody wants to transmit data to a certain center accumulating information, so that it can be easily used ("use one's work") or that other scientists can access the data and check conclusions or look for methodical and methodological errors.
2. **Labor costs:** Creating a database is labor-intensive, complicated and expensive. Sociologists prefer to take their time in conducting new, up-to-date studies rather than employ financial, intellectual and time resources for quite arduous, depersonalized work. In particular, it is (and would be) time-consuming to maintain contacts with authors of studies, descriptions of methodologies of studies, etc.
3. **Problem of changing information media:** The data from the first empirical surveys were stored on magnetic tapes. Later on some of the data were transferred to floppy disks. Only some information has been transferred from floppy disks to hard disks and CD-ROMs. Data input programs have also changed. At present a great deal of information is not accessible to ordinary users.

Due to the above-mentioned reasons and others, data from empirical sociological surveys are dispersed and some of the methodological information on the parameters of surveys has been irretrievably lost. At present only larger private public opinion research centers possess comprehensive information resources. In state-owned sociological centers empirical data are vanishing very quickly due to structural reforms and changing authorities.

It is more than obvious that Lithuania needs a multi-disciplinary research and resource center for the storage and dissemination of empirical (first of all, computer-readable) data for research in social sciences. Many questions still need to be answered. They include the following: what social science disciplines need to be included in the development of a social data archive, what will be the main objectives of a data archive and what major funding sources could be obtained for such a center?

Even without a full-scale inventory of empirical research projects, topics and empirical data stocks in Lithuania (this step needs to be taken as a preparatory step towards a systemic assessment of the situation), it is quite clear that a social science data archive (SSDA) must include as constituent disciplines sociology, political science, demography, educational sciences, history, social psychology and research in the field of economic

time series (at micro and macro level), because these disciplines are widely exposed to the creation and use of empirical data in the process of scientific inquiry. A broad spectrum of disciplines would enable data to be obtained from various sources, including researchers who have collected them in the course of their own investigations, and from private, international and government agencies.

A social science data archive definitely has two objectives. In this case there is no need to invent the wheel, but rather to use experience already accumulated by similar institutions in Western European countries and some Eastern European countries. On the one hand, it needs to be designed as a data repository and dissemination institution for social sciences in Lithuania and internationally. On the other hand, it must be a center which is able to provide training in the methods and technologies of the social sciences, as well as a source of assistance in the application of computer technology to research and teaching. The promotion of the culture of secondary data analysis could be a very important task of the SSDA, because this element is highly underdeveloped in Lithuanian social sciences. However, the systematic development and documentation of integrated databases will be major priorities of the SSDA during the first years of its institutionalization.

Since the Lithuanian academic community in social sciences is divided into at least three sectors (see appendix 2, p.73), i.e. those employed at universities, institutes of the Academy of Sciences and private data producers in the field of public opinion research, all the institutions from these areas need to be included in the development of a Lithuanian social science data archive. An inter-university consortium model, which is a constituent element in many Western social data archives, is questionable in the case of Lithuania. The social science data archive needs to be an inter-academic and inter-institutional center based on an agreement between universities and the institutes of the Academy of Sciences (cooperation with government and private agencies also needs to be considered) as core elements able to produce, process and disseminate empirical data in Lithuania.

The international dimension of the development of the Lithuanian social science data archive is crucially important, not least because of two reasons. Firstly, free access to already existing Lithuanian and international empirical data (see appendix 3, p.74) and expertise obtained through cooperation agreements with similar academic service organizations abroad would help to attract much more attention and material and intellectual investments from all domestically based institutions. Moreover, the SSDA facilitating access by Lithuanian scholars to international empirical data holdings and research development know-how is seen as a measure in building confidence and consensus among domestic Lithuanian institutions in the process of the formation of a national data archive. In future the participation of the SSDA in collaborative international projects would help to create a resource base for comparative quantitative research. Secondly, international cooperation is almost a basic precondition in order to obtain proper funding for the development of the SSDA from national and international

sources. The major domestic financial donors are considered to be the Lithuanian Ministry of Education and Science and the State Fund of Science and Studies. International level funding arrangements primarily depend on the ability to form international networks in order to apply for support from the EU 6th Framework Programme. Additional resources might also be received from national governments through bilateral partnership agreements between established Western European and developing Eastern European social data archives. In the case of Lithuania, this is most likely through agreements between similar social science infrastructure organizations in Nordic countries with whom many Lithuanian academic institutions have long-lasting connections. The early entry of the Lithuanian SSSA into the International Federation of Data Organizations (IFDO) and the Council of European Social Science Data Archives (CESSDA) is a necessary precondition for its successful development, especially in the areas of applying common standards of data documentation, retrieval and exchange. From short and medium-term aspects, the most important tasks in Lithuania are an inventory of existing empirical research institutions and social science data holdings, institutionalization of the data archive through inter-institutional agreements, creation of a website and sustainable development of the social science data archive.

Appendix 1: Major international, national and local empirical research projects in Lithuania, 1990- 2002

Type of project	Title	Principle Investigator (owner of the data)	Time
International	World Values Survey	Baltic Surveys	1990- 1999
	Central and Eastern Eurobarometer	Baltic Surveys, European Commission	1991-1997 , 1999-2001
	Political Party Survey	Iowa University, Baltic Surveys	1993, 1998
	Political Values	Times Mirror, Baltic Surveys	1991, 1992
	Gender Equality Survey	The Gallup Organization, Baltic Surveys	1996
	End of the Year Survey	Gallup International, Baltic Surveys	1991-1998
	Democracy Survey	WZB, Baltic Surveys	1995, 2001
	World Values Survey	Michigan University, Baltic Surveys	1990, 1997
	European Values Survey	EVS Group, Baltic Surveys	1999
	Social problems around the Baltic Sea	Finland, Baltic Surveys	1998
	Parliamentary Survey	Oslo University, Baltic Surveys	1993
	Political Attitudes Survey	USIA, Baltic Surveys	1989, 1991, 1992, 1993, 1994, 1995
	Public opinion and level of awareness on security issues in the Baltic countries	Ministry of Foreign Affairs of Lithuania and NATO Office of Information and Press, Baltic Surveys	1998
	Bozell-Gallup Worldwide Quality Poll	The Gallup organization	1996
	Public Opinion towards the Kosovo crisis	The Gallup Organization	1998
	Social Welfare System Communications Improvement Project	Phare, Baltic Surveys	1999
	International Children Survey	UNICEF, Baltic Surveys	2000
	Map of Corruption: case of Lithuania	Transparency International, Baltic Surveys	2001
	Attitudes towards reforms	Oxford University, Baltic Surveys	1993, 1997
	Lithuanian Elite Survey	Oslo University, Baltic Surveys	1993, 1998, 2001
	New Baltic Barometer	Vilmorus/CSPP, Univ. of Strathclyde [http://www.cspp.strath.ac.uk]	1993, 1995, 1996, 2000, 2001
	International Crime Victim Survey	ICVS International Working Group, Vilmorus and Baltic Surveys	1996, 1997, 2000
	Comparative Study of Electoral Systems, 1996-2000	Baltic Surveys with Comparative Study of Electoral Systems Secretariat.	1992, 1996, 2000
	Fears of the Future	Vilmorus/Michigan State University	1998
	Fertility and Family Survey	Demographic Research Center/UN/ECE (Brussels)	1994-95
	Brain Drain	Demographic Research Center/European Commission (Brussels)	1996
Acceptance of Population Related Policy	Demographic Research Center/BIB (Germany)	2001	
Public Perception and Awareness of Trafficking of Women in the Baltic States	Vilmorus/International Organization for Migration	2001	

... continued:

Type of project	Title	Principle Investigator (owner of the data)	Time
National	Monitoring of attitudes towards the EU	Vilmorus [http://www.euro.lt]	Since 1997 permanently
	Annual End of the Year survey	Baltic Surveys	1999-2001
	Investment Climate in Lithuania	Lithuanian Investment Agency, Baltic Surveys	1996
	Political values of Lithuanians: pre-election surveys	Baltic Surveys	1991, 1996, 1997, 2000
	Political culture in Lithuania	Center of Social Information	1994, 2000
	Monitoring of political attitudes and opinions	Vilmorus and Baltic Surveys	Since 1990 on permanent basis
	Monitoring of human rights	Vilmorus	2000, 2001
	Pre-election and post-election surveys	Center of Social Information, Vilmorus and Baltic Surveys	1992, 1995, 1996, 1997, 2000
	Information Society in Lithuania	Vilmorus /Soros Foundation [http://www.osf.lt]	2000-2001
Local	Ethnic minorities	Various survey agencies and institutions	
	Elite studies	Various survey agencies and institutions	
	Social stratification research	Various survey agencies and institutions	
	Closure of Ignalina Nuclear Power Station: social and economic consequences	Various survey agencies and institutions	

Appendix 2: Main empirical research institutions in Lithuania

	Institution	Data collections since/ remarks
Lithuanian Academy of Sciences	Institute of Philosophy, Sociology, Lithuanian Academy of Sciences	Late 1960s; sociological and demographic research data
	Institute of Economics, Lithuanian Academy of Sciences	Since the 1970s
	Institute of Social Studies	A successor institution to the Institute of Philosophy, Sociology, Lithuanian Academy of Sciences; since April 1, 2002
Universities	Kaunas University of Technology	Since the 1970s; sociological and political research
	University of Klaipėda	Since the 1990s; sociological empirical research
	University of Law	Since the mid-1990s; sociological and political empirical research
	University of Šiauliai	Since the late 1990s; sociological empirical research and educational sciences
	University of Vilnius	Since the 1970s; sociological and political research
	Vytautas Magnus University	Since the 1990s; sociological empirical research
Statistical offices	Department of Statistics	
	Lithuanian Bank	
Other government and non-government institutions	Ministry of Finances	
	Ministry of Health Care	
	Central Electoral Commission	Since 1992
	Lithuanian Free Market Institute	Since 1990
International organizations	EBRD, IMF, Transparency International, Population Activities Unit of the United Nations Economic Commission for Europe, International Organization of Migration etc.	Various years
Private institutions of public opinion and market research	Baltic Surveys	Since 1992
	Vilmorus	Since 1993
	Center for Social Information	Since 1993

Appendix 3: Selected empirical data collections on Lithuania available through international data archives

Organization / Archive	Data collection	Principle investigator
GESIS/ZA and Inter-University Consortium for Political and Social Research (ICPSR)	Central and Eastern Eurobarometer 1-8 (1990-1997)	Karlheinz Reif; George Cunningham; Malgorzata Kuzma; Jacques Vantomme; Louis Hersom.
ICPSR	Collective Memory in Lithuania, 1989	Howard Schuman, and Vladas Gaidys.
	Comparative Study of Electoral Systems, 1996-2000	Comparative Study of Electoral Systems Secretariat.
	Domestic Conflict Behavior, 1919-1966	Arthur S. Banks,.
	General Social Survey of the European USSR, April-May 1991	Michael Swafford, Polina Kozyreva, Mikhail Kosolapov, Gennady Denisovsky and Alfiya Nizamova.
	International Crime Victim Survey (ICVS), 1989-1997	ICVS International Working Group, Anna Alvazzi del Frate, Jan J.M. van Dijk, John van Kesteren, Pat Mayhew and Ugi Svekic.
	Major Power Interactions with Less Developed Countries, 1959-1965	Richard Cady, Franz Mogdis and Karen Tidwell.
	New Soviet Citizen Survey, 1990: Problems of Peace and Security	Arthur H. Miller
	New Soviet Citizen Survey, 1991: Monitoring Institutional Change	Arthur H. Miller, William Reisinger and Vicki T. Hesli.
	New Soviet Citizen Survey, 1992: Monitoring Political Change	Arthur H. Miller, William Reisinger and Vicki Hesli.
	Survey of Soviet Values, 1990	James L. Gibson and Raymond M. Duch.
Lijphart Elections Archive (website)	Lijphart Elections Archive http://www.dodgson.ulsd.edu/lij	University of California, San Diego. Social Sciences and Humanities Library.
GESIS/ZA	1991 A The Pulse of Europe (Lithuania)	
GESIS/ZA	1992 Values and Elections in Estonia, Lithuania and Latvia (Pre-Election Survey)	
Joint Project Essex-IFES- ACEEO	Parliamentary election results	1990, 1992, 1996, 2000 http://www.essex.ac.uk/elections

Note:

- 1 The majority of first-generation Lithuanian political scientists were trained as historians and lawyers, while some of them had a background in philosophy and sociology.

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Poland

Social Science Data Archiving and Dissemination

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1. Historical outline

Poland has the longest tradition of modern empirical sociological research (surveys) of any country in Central Eastern Europe. Due to the numerous sociological institutes which conduct empirical research as well as the large number of surveys which have been implemented, it is quite impossible to enumerate and describe them in comprehensive terms. This report therefore provides an outline of the most important developments.

During the so-called Stalinist period, sociology was considered to be a "bourgeois science" and was banned. However, the first substantive, non-ideological and basically positive (in terms of conclusions) review of Paul Lazarsfeld's "The Language of Social Research" was published by one of Poland's leading Marxist philosophers as far back as 1956, i.e. right after the so called "Polish October" or "political thaw". Sociology as a legitimate discipline in social sciences was soon re-established in academic institutions and sociological research reappeared. Even before establishing the first professional research organizations, several sociologists conducted research on, for example, family models, rural transformation, the intelligentsia and workers, attitudes to inequality and students' attitudes.

OBOP (Public Opinion Research Center), the first professional survey agency in Central Eastern Europe, was established by Polish Radio (later the Polish Radio and TV Broadcasting Corporation) as early as 1958. Although it was an institution financed by public radio and TV, OBOP cooperated very closely with sociologists from the Faculty of Philosophy and Sociology of the University of Warsaw. Academic sociologists conducted numerous surveys and OBOP researchers participated in academic life at the University. The surveys naturally concerned current social and political problems (although the latter were not sufficiently investigated due to censorship and political restrictions), but many of them were of an academic nature.

It must be stressed that the establishment of OBOP in 1958 coincided with the UNESCO Warsaw seminar on public opinion, in which such prominent researchers as Paul Lazarsfeld, Stein Rokkan and Jean Stoetzel took part. Somewhat later, Herbert Menzel, a close collaborator of Lazarsfeld, became a regular OBOP consultant and spent a

longer period of time in Warsaw. Training of Polish researchers in modern methods and their theoretical basis was made possible, for example, by a very large grant from the Ford Foundation. This grant also enabled many sociologists to attend American universities.

There were some ups and downs in OBOP's activities, the latter caused by political restrictions. However, different sociological research was always conducted by the Center, which is again very active nowadays.

Empirical sociology became quite strong very early on at the **University of Lodz** and in some institutes of the Polish Academy of Sciences. The first Polish representative public opinion survey and the first panel survey were conducted by the University of Lodz in 1958, not by OBOP.

One very characteristic feature of early Polish sociological research was that their authors placed a great deal of emphasis on methodological considerations at various generalization levels, i.e. not only on the methods as such ("cook books") but also on much more general methodological problems dealt with by logic and the philosophy of science (using American terminology) or meta-methodology (as it was called in Poland). This was obviously the result of close contact with Lazarsfeld's academic circles and ideas.

Survey research developed so rapid that a serious - though somewhat too ideologically driven - discussion took place in 1962 concerning so-called "ankietomania" ("questionnaire mania"). However, this did not seriously hamper further research.

One of the rapidly developing fields of empirical research concerned social stratification, inequalities, social mobility, occupational prestige and fair earnings. Contrary to all other Central Eastern European countries, where a Marxist class approach was the only official credo in social sciences, modern research on stratification and mobility was adopted in Poland by both non-Marxist and Marxist sociologists. This was also a period of thriving rural sociology.

Some time later, Polish sociologists took part in their first international comparative projects, e.g. concerning attitudes to local (regional) policies and problems or psychological aspects of work and social status. They also played an active role in establishing a new field of social research, namely "social ecology", which was based primarily (though far from exclusively) on the analyses of official statistical data supplemented at times by survey data.

In the early 1970s the second highly professional survey network was organized in Poland by the **Institute of Philosophy and Sociology of the Polish Academy of Sciences** as a separate branch of the Institute. In the mid-1970s another survey network was organized by the Polish Sociological Association. Its aims are to provide services to academic researchers and earn some money for the Association. With some modifications, these two networks have existed and conducted sociological research up until now, although the first one network mostly subcontracts out surveys.

By the end of the 1960s a relatively small though very active sociological research section had been established in the **Central Statistical Office**. In addition to various small-scale research activities, this section conducted in 1972 the socio-occupational mobility survey on the representative sample of 0.5 percent of the Polish working population. This is still the largest mobility survey both in Poland and the whole world, and its data are still used internationally. A great deal of sociologically relevant data were available from the ongoing statistical survey of household budgets (earnings, expenditure and consumption). Two large time budget surveys were conducted in connection with this survey. Sociologists and statisticians from the Central Statistical Office took part in international cooperation aimed at creating a system of socio-demographic statistics coordinated by the UN Statistical Office, the UN Conference of European Statisticians and the CMEA ("Comecon") Statistical Commission.

Sociological research and analysis have also been conducted since the mid-1970s by the **Institute of Basic Problems of Marxism**, which was established by the Central Committee of the PUWP (Communist Party). The Institute established a modern, computerized bank for its data. However, due to the particular political connotations and the Institute's links to the party authorities, this bank was never widely used and ceased to exist after the institute was dissolved.

The birth of "Solidarity" in 1980 and the subsequent temporary democratization of social and political life, which was curbed in 1981 by martial law, resulted in the intensification of social research on socio-political and economic attitudes. The first wave of the survey "Poles '80" was conducted, although its results were not disseminated until a few years later due to martial law restrictions. This was a very comprehensive survey of public attitudes towards a wide variety of social, political and economic issues.

One of the peculiarities of Polish martial law imposed in 1981 was not only the relatively small number of people who were killed compared with similar events in other countries, especially Latin America, but the fact that the regime wanted to ascertain public opinion and established a government **Public Opinion Research Center (Centrum Badania Opinii Społecznej – CBOS)**. On the other hand, several – at that time – illegal public opinion surveys were conducted during martial law by researchers connected to the underground opposition. Given the circumstances, the representativeness of these surveys was dubious and the results were biased towards the opposition. However, the results of "official" surveys, which were conducted by CBOS interviewers who presented themselves as representatives of a government research institution and were often recruited from military personnel or their families, were also biased due to the fear of repression or simply due to the prevailing distrust and dislike of the government.

CBOS was founded in the autumn of 1982 and the first research was carried out in the following year. It was then a unit of government. The parliamentary act decreed its goals as follows: "To provide information about social opinions concerning the economic and social decisions made and implemented by the government." In order to distinguish

it from the existing OBOP, the term "social opinion" (*opinia społeczna*) was used instead of "public opinion" (*opinia publiczna*) in its name, although "public opinion" was used in the English translation of both names. There was a very unconvincing attempt to explain the use of the term "social opinion" from an ideological point of view. Up until 1989 CBOS conducted 134 surveys and published 441 reports, many of them confidential, and made a number of smaller contributions to periodical publications.

CBOS was established by the military government during the period of martial law in Poland. Its motives are probably best summed up by a renowned Polish sociologist, who said that "after the bitter lesson they had learned in 1980/81, the rulers decided to listen to public opinion, even if they did not follow what they heard." The first director of CBOS was a professional social researcher from the military.

The circumstances of the establishment of CBOS were reflected in the topics of the first research which it conducted. The first project, which was conducted in the spring of 1983, was about "wages as perceived by workers in industrial enterprises in Warsaw." A number of different research methods were used during the initial period of the activity of CBOS. Both surveys and content analysis of letters "from the citizens" to the government were carried out. The contents of the press were also analyzed and a 'telephone hotline' was activated. At this early stage so-called 'workshops with opinion-makers' were organized. These workshops were mainly attended by scientists, journalists and, at times, opposition activists.

With the passage of time, however, most non-survey methods of research were abandoned. Before 1989 CBOS was already specializing in survey research methods, mostly conducted on the basis of samples representative of the adult population. Quota sampling was used initially, and then CBOS started to use random address samples. In the 1980s it was quite common to conduct surveys on randomly selected social strata, e.g. 'working class in large industrial enterprises', due to the political sensitivity of that group, but also on 'managerial cadres', youth, the intelligentsia, etc.

In the early stages of activity there were two types of surveys, i.e. comprehensive and topical. The comprehensive surveys, which started in 1984, usually focused on the attitude towards authorities and evaluations of current events (social sentiments). At that time they were first conducted twice a year and then four times a year. The reports from the surveys were partially classified information, but this subsequently became more seldom.

In 1989 at the start of the new political regime, CBOS was already an institute with considerable experience and research achievements. However, its professional position was not matched by corresponding legitimation. There was also a fairly widespread, but only partially justified conviction that research was instrumental to goals of the

ruling elites. There appeared a need for CBOS to find a place in the new democratic system so that it did not serve the political authorities, but instead specific societal groups and public institutions. It needed to function in a situation where public opinion research is an "instrument of democracy" while also being subject to market competition. The lifting of martial law and gradual liberalization of the state socialist system resulted in an increasing number of surveys conducted by various academic institutions. The second wave of the comprehensive survey "Poles '88", which was conducted by the Institute of Philosophy and Sociology of the Polish Academy of Sciences, is probably the best example of this trend.

2. Development of empirical research after 1989

Academic institutions

The change in the political and economic system increased both the interest of academic circles in empirical sociological research and the possibility of conducting such research. Sociologists from almost all sociological departments of the universities have conducted their own surveys on a great variety of topics. The research activity of the Institute of Philosophy and Sociology of the Polish Academy of Sciences has also intensified. Especially important were two subsequent waves of "Poles '90" and "Poles '95", which were conducted by this Institute. This series of four fully comparable surveys, which dealt with a large and comprehensive selection of important problems during the upheaval and transformation periods (1980-1995), was created in this way.

The establishment of two new academic research institutes was particularly important. The first institute was the **Institute of Political Studies of the Polish Academy of Sciences** while the second was the **Institute for Social Studies of the University of Warsaw**.

The Institute of Political Studies has conducted many surveys. Special mention must be made of a new series of the Polish General Electoral Survey, which has been repeated on the occasion of every subsequent presidential and parliamentary election since 1990. The Institute also attempted to organize the first central archive of Polish sociological research surveys. This attempt was unsuccessful, primarily on account of the resistance from the community of researchers, who wrongly perceived the project as a threat to their independence and autonomy. The idea was finally abandoned.

The Institute for Social Studies conducts the annual Polish General Social Survey (PGSS). The Institute participates in the International Social Science Program (ISSP), which constitutes an integral part of the PGSS. The data from all surveys conducted by the Institute are documented and archived according to international standards. This is therefore the only institute in Poland which has a well-established and professionally run data archive for its research. (See appendix, page 84).

It must be emphasized that, since 1990, Polish sociologists have participated in all major international research projects such as the World Values Survey, International Social Science Program, New Europe Barometer, Consolidation of Democracy Project, International Survey of Economic Attitudes, etc.

Due to their great number and the lack of any registration body, it is impossible to present all academic sociological surveys comprehensively and systematically without extensive research.

Public opinion research centers

Two major public opinion research centers, OBOP and CBOS, have taken quite different development routes.

CBOS

CBOS, formerly a government institution, has acquired the status of an independent foundation (NGO) with a guaranteed annual grant from the state budget (although without any guaranteed amount of grant money). From 1990 onwards the comprehensive surveys have been conducted on a monthly basis. The reports were now open to the public and were used increasingly by the mass media. At that time the goals of the Institute were redefined: on the one hand, CBOS was to "inspire, organize and carry out public opinion research in the sphere of interest of the government", but on the other hand "carry out public opinion research on its own initiative." The statutes make it mandatory for CBOS to "make the survey data available to the general public and the representatives of the scientific community." Quite often, investigated problems are not only of topical importance, but are also of a more general, academic nature. The intensity and variety of the research activities of CBOS are best illustrated by the fact that between 1995 and 2001 it published as many as 1315 thematic reports and several books. In addition to its statutory activity, CBOS conducts commercial surveys for both academic institutions and business organizations.

At present the data from individual surveys are stored as separate files in ASCII format. The documentation of the data (including the questionnaires) is available for public use in the CBOS Information Center where the researchers can locate the relevant survey, check out the variables and obtain the data. However, data from each survey have to be retrieved individually. An integrated dataset which serves as a basis for regional analyses has already been established and work is in progress regarding to organization of the comprehensive data archive linking reports, questions and individual data.

OBOP

OBOP has been privatized. The majority of its shares are now owned by one of the large international market research companies while some shares remain in the hands of the Polish Public TV Broadcasting Corporation. This means that the main emphasis is on TV audience research. However, a typical public opinion survey is also conducted every month.

There are at least three commercial market and social research organizations which systematically or very often conduct public opinion research. Some of this research is commissioned by the media (one of the leading Polish daily newspapers and one weekly journal order the surveys systematically, and others do it occasionally), while some research is conducted in order to present the results publicly and to make the firm better known and renowned. Public opinion research is therefore often conducted as a public relations exercise. (There are also other commercial market research companies that conduct sociological or public opinion research very occasionally, either on the orders of their clients or as a public relations exercise).

Statistical Office

There are two major sources of sociologically relevant statistical data from the Central Statistical Office (CSO). The first source is an ongoing survey on household earnings, expenditure and consumption while the second is a monthly representative survey of the workforce. Both contain from time to time some questions other than their main topics. In addition, the CSO conducts ad hoc social surveys. They constitute, however, a kind of research activity of secondary importance to the Office.

3. Regulations concerning access to data

There are no universal regulations relating to any kind of research institutions. They must therefore be discussed separately.

Academic institutions

A general rule so far is that the principal researchers and their research teams have full control of the data. In principle, it is almost entirely up to the researchers as to whether or not they publicize the data. The researchers themselves are very divided on this issue. Some researchers publicize data, some do not, and some do it on a very selective basis.

Market and opinion research institutes

The situation differs between the institutions and between the categories of research. As a public institution, CBOS observes the rule that all individual datasets from its "statutory" surveys are available for the public as soon as all thematic reports from a given survey are published (usually 1-2 months after the survey, but sometimes even earlier). In the publicly accessible part of the archive it stores all the data – in an electronically coded format – from surveys from the years 1983-2001. Any person or institution can order any data from any survey, unless the survey was purchased by one of our commercial clients.

The general public and the mass media mostly use the CBOS data through the research reports from the monthly omnibus surveys as well special, topical surveys whose results are also sometimes published as reports. The data from the extended topical surveys are also used in analyses which are contained in larger scale publications: books and scientific articles. However, the data from the surveys ordered by outside customers constitute their own property and the CBOS has no right to distribute them. Some clients (especially if they are scientific institutions) allow the findings to be publicly accessible. Other privatized research agencies are the owners of the data from their own (non-commissioned) surveys. There are no rules concerning their availability. The data from ordered surveys are the property of the clients (as above).

Central Statistical Office

The CSO can not make public any individual data which would allow the identification of the respondent or other investigated unit (business, institution, etc.). However, fully anonymous data are usually given to academic institutions and other legitimate researchers on request.

4. Funding situation

Most of the sociological research is now financed by the national funding agency called the Committee for Scientific Research (similar to NSF, etc). However, there are also many other smaller sources of funds, including international foundations.

5. Assessment of the potential for establishing a national data archive

There is growing interest among sociologists and public opinion researchers to establish a central archive for social research data. However, this depends on two vital issues, namely the funding and the consent of the research community. Current economic problems in Poland make it unrealistic to expect the availability of money necessary to establish a full scale archiving institution in the near future. However, some money

may be available for developing and modernizing existing archives, such as those in the CBOS or the University of Warsaw. The most realistic idea is to initially attempt to organize the archive solely for those researchers and institutions who would voluntarily agree to share their data. This would be the first step towards a more comprehensive project based on some generally binding regulations. A good example would certainly lead to more consent.

Data archive projects undertaken by CBOS

Dataset for regional analyses

CBOS has created an integrated dataset which permits analysis of several important attitudes on a regional basis. This database is constructed by combining individual files from the omnibus surveys from one year (12 different samples, mid-2000 to mid-2001; then for a consecutive year) into one file. Throughout the year, several indicators were repeated every month:

- Evaluation and predictions of the current political situation
- Evaluation and predictions of the current economic situation
- Party preferences
- Trust in selected politicians
- Evaluation of the government
- Material living conditions of households
- Support for EU integration (not every month)
- Religiousness
- Left-right orientation
- Socio-demographic data: sex, age, education, residence size

The variables from different surveys are assigned one name, thus creating a file with around 12,000 cases. This means that each “voivodship” contains enough respondents to draw conclusions on regional differences.

Archive project

The most significant archiving project undertaken by CBOS is the creation of a database that will contain the data from the omnibus surveys from the years 1983-2002 as a single data universe. CBOS is constructing a relational database which will, in the final stage, comprise data from all omnibus surveys in one dataset with tools enabling

the researcher to instantly find the data on the same question through documentation based on the DDI (Data Documentation Initiative). The DDI is "an effort to establish an international criterion and methodology for the content, presentation, transport and preservation of 'metadata' (...) With the achievements of the DDI, codebooks can now be created in a uniform, highly structured format which is easily searchable, lends itself well to simultaneous use of multiple datasets and will significantly improve the content and usability of metadata." (1)

This type of database is particularly suitable for datasets composed of multiple files with long time series. Usually, academic surveys pertain to one particular issue and time-series data can be created after several separate data files are browsed, which requires extensive efforts on the part of the researcher. Comparability is achieved through recoding. However the CBOS database is different from strictly academic surveys:

- The data usually have long time series with different intervals.
- Some important questions are (slightly) modified in time.
- The datasets contain more than one survey.
- There is an immense number of questions asked over the years (data from over 160 omnibus surveys will be included in the final version of the database).
- It will be possible to generate annual datasets (or datasets covering several years), topical datasets and others based on arbitrary criteria of the researcher.

The target version of the dataset will be serviced by client programs for the database, which will make it possible to search the whole dataset using standardized codebook elements (DDI). At present standardized documentation (according to the DDI standard) is applied to the datasets and software, thus enabling users to locate the data on identical questions through which the data file is created or adapted. In the next step the data will be integrated with the relational database and with the client search software enabling the users to find the relevant data. The search engine will enable the users to locate data with the help of:

- mnemonic nametags
- keywords in questions
- survey dates (month or year)
- according to the position of the question in a survey - what follows and precedes it

Through the search engine it will be possible to locate both time series of the same questions and blocks of questions in a survey. It will be possible to generate a SPSS data file with the help of the above-mentioned search options and to calculate frequencies online as well.

It is expected that the data from current years (i.e. 2001 and 2002) will be available by the beginning of mid-2002. Data from previous years will gradually be accessible and will eventually go all the way back to 1983. Due to the shortage of funds, it is impossible to tell when the complete archive will be available.

Appendix: Polish General Social Surveys 1992-1999 (PGSS)¹

Introduction

The PGSS is the first, and as yet the only, academic social survey research program in Poland, for which the data and full methodological and technical documentation are public and non-commercially disseminated. It is a program in which the main emphasis is placed on the literal repetition of questions and items and item sequences. As of 1992, close to 400 indicators have been strictly replicated in each subsequent survey. The fundamental aim of replication is to allow for systematic trend studies connected with the social, political and economic transformation process in Poland. The PGSS allows for systematic study of the effects of systemic transformation in Poland in cross-national comparative perspective. This is possible due to co-operation within the International Social Survey Programme (ISSP) as well as due to the literal replication of about 50 indicators from the American General Social Survey (GSS/NORC, Chicago), and from the German General Social Survey (ALLBUS/ZUMA, Mannheim). Many substantive PGSS indicators are also comparable to indicators in the British Social Attitudes Survey (BSA/SCPR, London). The entire (printed up to 1995 and since the 1997 available only in electronic form) PGSS methodological documentation (codebooks), along with a set of control statements to read the dataset into standard computer statistical packages, are also provided in English. Thanks to this, PGSS data are also available to the international community of social scientists and are disseminated by the international social data archives (ICPSR, ZA, Roper Center, ESRC, CIESIN, TARKI).

The PGSS mission

The originality of the PGSS mission is based, above all, on the dissemination of data allowing other researchers to systematically study the social consequences of systemic change in Poland. In the past, the Polish academic milieu conducted numerous and inspiring survey studies on social, political and economic attitudes and behavior. The data gathered from these studies, however, have never been made publicly accessible nor used by “secondary” researchers. In effect, the exchange of information in a broader scientific environment took place only at the stage of the final scientific product (publications, printed communiqués with research findings and conference presentations).

This situation, in which there was only limited exchange of data and information in the broader scientific community could be explained by, amongst other things, the normative legacy of science from the communist period. Intense institutionalization and centralization of scientific system and its technological infrastructure, favored the definition of intellectual scientific property as the property of the organization, or of the people gathering and producing scientific data, but not as the property of the scientific community as a whole, regardless of its structural and functional divisions.

On the other hand, as in the majority of countries in the world, the dominant style of conducting social science research in Poland is to concentrate responsibility for all phases of research project in the hands of a few researchers (or centers and teams), from the formulation of the problem, through data gathering, processing and analysis, to the publication presentation of the research findings. This philosophy of „global responsibility“ for a project is dysfunctional, even when the project researchers are interested in the secondary analysis of „their“ data by researchers from other centers. It usually turns out that the simplified, working documentation on the research and the standards of data preparation which are prepared for the internal needs of the given center, (dataset integrity, data file structure, variable construction, codes and codebook documentation) are either insufficient or unintelligible, even to experienced researchers from other centers. When studies encompass large samples, and the information structure is more complicated (cross-section or longitudinal surveys for example), use of data from other centers often becomes technically impossible.

The transformations in Poland have produced a huge increase in the number of commercial and marketing social research centers, the principle of whose work is, of course, protection of data and findings from public access. From the perspective of the development of „open“ academic social studies, the development of commercial survey centers has become dysfunctional, as these centers, by offering very attractive wages, are able to employ the most talented graduates of the empirical social sciences, or researchers from universities who wish to improve their material status through additional work in the private sector – in one of the social science departments at Warsaw University, for example, more than half of the doctoral graduates are employed in a second job in commercial social research centers.

The systemic changes in Poland during the 1990s have, of course, had favorable effects in the sphere of democratization of the institutional scientific system (an increase in the autonomy of universities; independence of the financing of scientific studies from political power structures; and independence of a scientific career from ideological criteria). However the creation of an open system for the exchange of information in the social sciences in the context of the accumulated data gathered (often duplicated!) by autonomous research centers, still remains a problem. The main reason for this is to be found in the radical limitations on public spending for science and scientific research in this period of deep economic crisis that developed at the outset of the political transformation in Poland and other post-communist countries. Limited spending on

social research has resulted in radical cuts, within scientific centers, to those funds which are devoted to the implementation of concrete projects that could be designated for archiving and public dissemination. This can be more readily appreciated if we take the experience of the PGSS as an example. The preparation of PGSS data for deposit in public archives (for example, cleaning and checking the integrity of the cumulative datasets; preparation and publication of bilingual codebooks, machine-readable documentation, bilingual datasets and tools helpful in viewing results or finding desirable variables) consumes more than one-third of the total expenditures on annual PGSS research, and every year absorbs four months of work from three researchers.

It should be added that the limitation on public funds for science has become a serious hindrance to the development of an independent social data archive in Poland. In this situation, the costs and efforts of data preparation and distribution have to become the responsibility of the centre and researchers carrying out the project.

It was with precisely this conviction that we initiated preparation in 1991 of the Polish General Social Survey project, and founded the Institute of Social Studies at the University of Warsaw.

Institute for Social Studies

The Institute for Social Studies (ISS) was established in January 1991 as an independent research unit of the University of Warsaw on the basis of a Memorandum of Agreement between the University of Warsaw and the University of Michigan. Under this agreement, the ISS was affiliated with the internationally known Institute for Social Research at the University of Michigan, Ann Arbor. The ISS is an interdisciplinary research-oriented institution, bringing together sociologists, psychologists, economists and political scientists. Most senior members of the institute staff hold permanent appointments in the University of Warsaw social science departments.

The ISS is largely self-supporting through grants and contracts from domestic and international foundations, corporations and the Polish government. Most research is funded by the Polish National Committee of Scientific Research and the Ministry of Education.

The main objectives of the Institute are:

- To monitor social, political and economic processes in those societies which are in transition from a totalitarian system to a democracy and a market economy.
- To promote an interdisciplinary approach to studying these processes.
- To promote the internationalization of East European social and behavioral sciences.
- To provide high quality training for graduate students, young scientists, and policy makers.

- To establish and maintain standards for social science data collection, preparation, processing, archiving, and dissemination.

The PGSS, which is produced and distributed by the ISS, is an example of how the latter mission of the Institute is being achieved.

The Polish General Social Survey

Design and content

PGSS data come from personal interviews administered to national samples using a standard questionnaire. The sample covers adults, 18 years of age and older, living in non-institutional households. Each PGSS survey uses an independent, multistage, stratified probability sample about 1,600 cases (and since 1997 – about 2200 cases).

PGSS data include a wide range of variables, touching on many areas of current interest to social scientists. Over 1100 different variables exist in the 1992-1999 PGSS cumulative data file. The content of the survey changes somewhat from year to year, but core questions, and the order in which they are asked, have been kept intact, thus enabling comparative analyses across time. PGSS core variables include socio-economic and demographic variables with an emphasis on stratification measures (occupation, labor force status, education, income) of respondents, their spouses and parents. Additionally, there are attitudinal variables concerning political opinions and ideology, national spending, religious beliefs, social inequality, job and occupational values, tolerance, educational values, attitudes toward other countries, traditional sex roles, family issues, abortion, and homosexuality. Other variables gauge subjective well-being, social class identification, satisfaction with different spheres of life, and confidence in different public institutions. Respondents are also queried about their voting behavior, social interactions, religiosity and health. Each year, additional topical modules of questions from the ISSP have been added: „Inequality II” (1992), „Environment“ (1993), „Family and Changing Gender Roles II“ and „Sexual Behavior“ (1994), „National Identity“ (1995), „Role of Government III”(1996), and „Work Orientations II” (1997). In 1999 there were two more international modules conducted which will be distributed with the data-set originating from 1999 PGSS edition, „Religion II” (1998) and „Inequality III” (1999).

Given the limited PGSS funds a new biennial, split-sample design has been used since 1997. The sample consists of two parallel sub-samples of approximately 1,200 cases each.

Question and item selection: the role of the PGSS Advisory Council

The criteria for the selection of questions and indicators for the PGSS were indicated by the overall aims of the project. The major goal of this project has been to provide the social science community with large-scale substantively important data of high quality. Who decides at is important for the science community? And who evaluates the quality of the data? At the beginning of the planning of the PGSS survey, we had a clear answer to these questions an independent advisory group to the PGSS principal investigator, which should function as an intermediary between the social science research community and the PGSS. In 1992, the ISS Scientific Council appointed the PGSS Advisory Council, consisting of 10 representatives of various disciplines in the social sciences and from different organizational sectors of Polish science (universities, academy of sciences). Among its tasks are counseling in the research conducted as part of the PGSS program, the evaluation of methodological standards, and supervision over the structure of successive PGSS editions. The Council also examines proposals from research teams, and individual researchers, to include new questions, indicators or self-contained problem supplements in the PGSS project.

With the hindsight of nine years' experience of the PGSS, it could be argued that consensus between the principal investigator and the PGSS Advisory Council is most important. In this way, the PGSS serves both those for whom the PGSS is an important vehicle for studying social trends in Poland (and also in cross-country comparative perspective), as well as those for whom the PGSS represents a vehicle for studying the methodological issues presented by complex surveys, or for testing the possible limits of knowledge about society as marked out by social survey technology and tools.

Field procedures

The field research is carried out by a network of professional interviewers. The survey operation unit of the ISS exercises control over the substance of the field research, which includes: supervision over selection of the sample, testing of the research instruments, developing documentation connected with the field work, training the field managers and interviewers, and control functions during the field phase of the research project.

The response rate is one of the criteria for evaluating the standards of realization of the survey research. When we add together the ineligible addresses (out of sample, not dwelling units, vacant dwelling units), the non-response from refusals, non-contacts, and others, the total non-response for the PGSS surveys ranges from 17.7% (the PGSS 1992) to 28.7% (the PGSS 1999).

In general, the PGSS samples closely resemble the distributions reported in the census. Some differences may occur due to the nature of the sample design (the probability of selection of the respondent is inversely proportional to the number of adults in the household), and due to the unequal response rates in different social strata (eg in rural and urban areas for example). To adjust for such differences in the PGSS file, users can apply a weight variable, which simultaneously calculates results corrected to population parameters.

Data preparation

From the perspective of our experience, the preparation of data for public access is not only a very time-consuming and costly activity, but is also the most stressful stage of the survey research process. We realized that the PGSS will be judged, not only in terms of whether the indicators are “interesting” and the picture of Polish society “curious”, but also – and above all – in terms of whether the collection of data contains horrible errors. Public and anonymous users of an archived dataset may find errors everywhere in particular variables or in the codebook, or may be unable to replicate the previously published research results based on the same dataset. Knowledge about the possible errors in survey data is common among both researchers and data users. Several tools have been developed to reduce the number of possible errors in the PGSS dataset to minimum.

The structure of PGSS Datasets

Many examples can be found which illustrate the thesis that the value of concepts and scientific research findings is intimately associated not only with the logic and rationality of the underlying argumentation, but also with the aesthetic clarity of the empirical proofs presented. The PGSS team shares this conviction. Moreover, it recognizes that the degree of interest in the PGSS findings also depends on the ease with which researchers, and especially young researchers, are able to search for indicators and for data to test their own hypotheses in the PGSS/ISSP dataset, which has accumulated a considerable amount of, often eclectic, material.

Since 1992, the PGSS has been organized as a cumulative file in which each year is a sub file. The raw data from the latest year are merged with the existing cumulative file, and an updated cumulative file is created. At the point of the annual update, the project also adds in any new variables (variables from new ISSP modules for instance) to the old surveys and makes any corrections to past years. The merged PGSS data file is stored in ASCII form, along with a set of control statements to read it into a standard computer program (SPSS). PGSS data are also archived in an *Export/Transport* portable system file. In our experience, ASCII (row) PGSS data files are the most attractive form for Polish and international users because they are software-independent and they have a better chance of being read in the future, regardless of what happens to

individual statistical packages. The SPSS control and comment statements are distributed in the Polish and English languages. This results from the ‘‘internationalization’’ of the PGSS program. To facilitate the search for indicators that interest the user, the set of control statements contains extended labels for each of the variables and all value labels for almost every variable.

PGSS Codebook

The basic documentation for the PGSS is the *Cumulative Codebook* which is updated with the creation of every new cumulative dataset. It contains the exact wording of all questions and response categories, the physical (column) locations of all variables in the rectangular data file, the number and mnemonic names of all variables, and the frequency distributions for all items in each year of the PGSS/ISSP survey. Details on how each variable was constructed are provided for those variables created by the project staff. In addition, the *Cumulative Codebook* has 18 appendices containing the project description; information on sampling and weighting; recodes; distributions for multicolumn variables; codes and descriptions for the *International Standard Classification of Occupation* (ILO-1988); the codes and descriptions for the Polish and the International Industrial Classification. There are also three indexes of the PGSS/ISSP variables with their associated codebook pages: one using Q-numbers; the second using PGSS mnemonics; and the third which lists those variables it are also used in the GSS/NORC and ALLBUS/ZUMA surveys. The *Cumulative Codebook* also includes copies of the original data collection forms: the PGSS questionnaire, and the questionnaire for the ISSP topical modules. This is helpful for researchers, who often want to know the context in which a particular question was asked, and to see the survey instrument as a whole.

Up to 1995 the PGSS *Cumulative Codebook* (in Polish and English) was distributed in both hard copy form (about 500 pages) and in computer-readable form (ASCII text). Since 1997 it is available in electronic form (MS Word format) only. Both forms of documentation are available in Polish and English.

Distribution of the PGSS Dataset

Due to the accumulation of data from subsequent editions of PGSS, data files have become quite large. The PGSS 1992-1999 dataset includes 11192 respondents and 1117 variables. To facilitate the use of this large data file, in 1997 a number of new solutions were introduced concerning archiving, distribution and searching.

1. Since 1997 PGSS/ISSP datasets and documentation are distributed on a **CD-ROM** (both in Polish and English).

2. The CD-ROM also contains a tool for searching the cumulated data file – the **PGSS Viewer**. It allows to search for variables both by question numeric, mnemonic identifiers, and any phrase from question text or answer categories. One can also print distribution tables or transfer them to other documents. The viewer is available both in Polish and English.
3. To facilitate data access via the Internet the ISS created an Internet version of the cumulated data file: the **PGSS-i** (<http://pgss.iss.uw.edu.pl>). The results of the PGSS 1992-1997 are offered in form of tables. For online analyses (cross-tabulations, charts) the users have to register in advance (for statistical purposes only).
4. Additionally, in August 2001 the PGSS Program's website was set up (Polish version; English version is under construction). The main intention is to inform about the PGSS and ISSP as well as encourage the professional use of their results. (<http://www.iss.uw.edu.pl>)

Note:

- 1 Co-authors: Tomasz Jerzynski and Marcin Zielinski. Revised and updated version of: B. Cichomski, Polish General Social Survey: Example of Dissemination Activities. In: R. Walker and M. F. Taylor (2).

References:

- (1) <http://www.icpsr.umich.edu/DDI>
- (2) R. Walker and M. F. Taylor (eds.), Information Dissemination and Access in Russia and Eastern Europe. Problems and Solutions. NATO Sciences Series, Series 4: Science and Technology Policy – Vol. 26. 1998.

Ukraine

On the Road to a Ukrainian National Social Archives Network

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1. Historical outline

Before Ukraine became an independent state in 1991, and prior to 1989, sociology and empirical sociological research in Ukraine developed more generally within the context of social sciences in the Soviet Union. At the end of the 1930s sociology was declared a pseudo-science and was banned in the Soviet Union. No fundamental or applied research took place in the field of sociology until the start of a revival at the end of the 1950s and during the early part of the 1960s. This was the period of de-Stalinization when dogmatism in the field of social sciences was reduced to some extent.

In Ukraine “local” empirical sociological research started (at the enterprises in Dnipropetrovsk, Zaporizhya, Odessa and Mykolaiv). Studies focused mainly on workers’ motivation in enterprises, the professional orientations of teenagers, problems of leisure time, problems in the family, problems of youth and the development of personality. It was not possible to study theoretical sociology – only “applied sociological research” was possible. In addition, interpretation and analysis of collated empirical information were conducted strictly within the framework of historical materialism. The study of many of society’s problems was simply forbidden. Public opinion was not monitored. Despite the fact that elections in the Soviet Union were held regularly, it was not considered necessary to study the electoral behavior of the population. Because of severe censorship, it was very difficult to publish the results of those studies that were completed. Contacts with foreign colleagues were simply not possible for the majority of Soviet social scientists.

The Soviet Sociological Association was established in 1958. This public organization united scientific groups and experts involved in scientific and pedagogical work in the field of sociology. Association members published articles on sociology in such journals as *Problems of Philosophy*, *Problems of the World and Socialism*, and *Philosophical Sciences*. In 1974 the professional journal *Sociological Research* was established in Moscow.

In 1968 a Ukrainian branch of the Soviet Sociological Association was established. In 1961 a laboratory for specific sociological research was created at Kiev University. This laboratory developed methodical techniques and also conducted empirical research. In 1969 the Department of Sociology was established at the Institute of Philosophy of the Ukrainian Academy of Sciences. Faculties connected to sociology were also operating in some Ukrainian universities (for example in Kiev and Kharkiv).

When the period of “perestroika” began in the Soviet Union, social science research became more intense and active. All-Union surveys were conducted. In the design of these all-Union surveys Ukraine was normally studied as one of the major regions of the Soviet Union. As such, the sample and the resulting information collected in Ukraine were not representative of the Republic of Ukraine as a whole. The first sample that was representative of the population of Ukraine as a whole was only taken in 1984, but was not used until 1990. The Department of Sociology of the Institute of Philosophy of the Ukrainian Academy of Sciences also conducted a number of surveys (distinct from All-Union surveys) focusing, in particular, on living conditions and labor force migration in Kiev. Information from some of these surveys was stored in the All-Union Data Bank established in Moscow in 1987 (see N. Rostegaeva p. 157). At the end of the 1980s the journal *Philosophical and Sociological Thought* was established.

On the whole, it is reasonable to say that prior to 1989 empirical sociological research in Ukraine was rather poorly developed. The number of research centers was small. There were no independent centers, i.e. research centers with financial resources separate from the state budget. The number of research projects was small. It was neither possible to freely select the topics of study, nor freely publish the results. Both censorship and ideological limitations presented obstacles to scientific work.

2. Development of empirical research since 1989 and description of data collections

In 1990 the Institute of Sociology was established, and the Ukrainian branch of the Soviet Sociological Association was transformed into the Sociological Association of Ukraine. A Faculty of Sociology was established at Kharkiv University in 1990. A Faculty of Sociology and Psychology was established at Kiev University in spring 1991. In 1992 a Department of Sociology was opened at the re-established University of “Kiev-Mohyla Academy”. Faculties of sociology are now operating at both state universities (in Dnipropetrovsk, Lviv, Odessa, Lugansk and Volyn) and private universities in Ukraine.

During the Soviet era universities were primarily engaged in teaching, while the institutes associated with the Academy of Sciences were responsible for research. As a rule, every Faculty of Sociology within the major universities in Ukraine now has a social science laboratory, which conducts research at the university and provides sociological practice for the students. However, the separation of responsibilities now generally continues in Ukraine. Universities are first and foremost involved in teaching students, while the institutes of the Academy of Sciences and new independent research organizations are primarily responsible for the majority of the research. Special scientific

councils for the defense of dissertations (candidate of science degree and full doctoral degree) in the field of sociology operate at Kiev University, in the Institute of Sociology and at Kharkiv University. Since 1998 the academic journal *Sociology: Theory, Methods, Marketing* has been published in Kiev.

During the 1990s the amount of empirical sociological research increased dramatically. The number of research centers also grew. Private (not state-supported, but separately financed) research organizations appeared, which employ different sources of finance – money from political parties and organizations, grants from foundations and international organizations, and money from business enterprises (for marketing research).

Excellent service depends on experience and high-quality professional staff. A number of firms specialize in field work (that part of research related to data collection) required for empirical research – sociological, political, economical, marketing, and epidemiological. These firms conduct dozens of research projects every year. In many cases these firms neither participate in the development of methodology or research instruments, nor analyze data. They collect the data, generate the necessary computer files and transmit the data to customers along with a technical report and additional information. Academic institutes, independent research centers (very often with NGO status), political parties, commercial business firms, international organizations and grant agency funds act as the customer in these cases. The customer independently analyzes the data and publishes the results. International organizations quite often call for tenders for research and polling firms compete for these funds. Additionally, polling firms conduct research with their own money or negotiate with the customer the right to analyze and use the collected data. This also enables the company to become involved in analytical work and publish the results of research in newspapers or scientific journals, or to present results on television. Polling firms also regularly conduct omnibus surveys, where clients may buy the answers to one or more questions comprising part of a larger survey.

It must be said that public opinion surveys are now rather an ordinary phenomenon in Ukraine. At the beginning of the 1990s many respondents treated the interviewer with suspicion and were afraid to answer questions about their attitudes toward political events. Information on the results of public opinion polls can now be found in any newspaper, on many TV programs and in radio programs. Ukrainian respondents now speak quite openly about politics, but like people in many other countries they are reluctant to talk about their income (this may also be partly due to the large “shadow economy” in the country).

Electoral surveys form an important element of this empirical research. A number of research organizations permanently publish the ratings of political parties and politicians. For this purpose they conduct public surveys (as a rule, telephone-based) and/or expert surveys. Ukraine has more than 120 registered political parties (33 political parties and coalitions participated in the 2002 parliamentary elections). The level of competition during election campaigns is high (half of the Ukrainian Parliament is elected based on lists of political parties and coalitions).

Political parties are interested in people's opinion about different problems, for example domestic and international policy, economic reforms and questions of ideology. Political parties therefore commission quantitative surveys (mass polls) and qualitative studies (focus groups and expert interviews). In the period directly preceding elections, the mass media publish the results of surveys conducted by unknown polling firms and agencies. The information in these publications is often presented in such a way that it is impossible to carry out a professional assessment of the quality of the data and the validity of the conclusions. The Sociological Association of Ukraine has offered to organize a voluntary accreditation of polling firms within the Association (with the purpose of certifying the professionalism of an organization). A number of polling firms, which work permanently and not just during election campaigns, have already been accredited. Nevertheless, a rather intense discussion is currently taking place concerning the trust in political ratings and the influence of sociological research publications on the election results (according to Ukrainian legislation, it is prohibited to publish political ratings during the 2 weeks immediately preceding elections).

The first exit poll was conducted by SOCIS during the parliamentary elections in 1998. An exit poll was then conducted during the first and second rounds of voting in the presidential elections in 1999 (Kiev International Institute of Sociology, SOCIS, Social Monitoring Center).

In April 2001 the President of Ukraine issued a decree entitled "The development of sociological science in Ukraine". This decree affirmed the need to develop sociological education, sociological research and international cooperation, and to create a sociological data bank. The All-Ukrainian Sociological Service has recently been established in accordance with this decree. This organization was created as an independent research body in which the state holds less than 50% of the shares.

Institute of Sociology of the National Academy of Science of Ukraine

In Ukraine the largest academic institute in the field of sociology is the Institute of Sociology of the National Academy of Science of Ukraine. During the 10 years of its existence the Institute of Sociology has conducted regular research devoted to the study of the structure of Ukrainian society, social aspects of economic reform, the socio-psychological state of Ukrainian society, the social well-being of the population, socio-cultural and societal processes, functions of the mass media, public opinion and the

social consequences of Chernobyl's disaster. This set of empirical research of the Institute includes the monitoring survey Ukrainian Society on the Eve of the 21st Century (the field work was carried out by SOCIS). This data collection includes eight all-Ukrainian surveys (sample of 1800 respondents), which were conducted at intervals of approximately one year between 1994 and 2001. The objectives of the project are to study processes of transformation in Ukrainian society and monitor the state of society and its economic, political and national cultural characteristics reflected in public opinion. The results (tables and comments) of this monitoring are available to the public (also in English). The data are not only actively used by employees of the Institute of Sociology, but also by scientists, post-graduate students and undergraduate students from other institutes and universities in Ukraine. This collection constitutes an important part of the data archive of the Institute of Sociology. A special research group within the Institute is working on the establishment of the Ukrainian sociological archive and data bank in cooperation with universities and other research organizations in Kiev.

The Kiev International Institute of Sociology

The Kiev International Institute of Sociology (KIIS) was founded in 1991 as the research center of the Sociological Association of Ukraine. In 1992 it was transformed into a private joint venture and began to cooperate closely with the University of "Kiev-Mohyla Academy". KIIS's partner in the U.S.A. was Paragon Research International. KIIS is accredited with the Sociological Association of Ukraine. Collaboration with Western specialists has helped to introduce new research methods and to disseminate these methods throughout Ukraine. One notable benefit that accrued to KIIS from international cooperation was the development of sampling in consultation with Leslie Kish and Steven Heering, Director of the sampling unit at the University of Michigan's Survey Research Center. The sample is random at every stage, with probability proportionate to the size calculated at the first stage. Having adopted such methods, and given its private status, KIIS has been able to conduct regular surveys even during times when no government support was available for social surveys. The current situation in Ukraine is characterized by almost a complete absence of government support for the implementation of social surveys. Most surveys are conducted using funds from international grants or from commercial projects. The Institute's survey network allows it to conduct random sample surveys which are representative of Ukraine both as a whole and in its separate regions.

The main topics of scientific research are:

- The relationship between social structures and personality under conditions of radical social changes (joint American-Polish-Ukrainian project carried out under the leadership of Prof. M. Kohn, Johns Hopkins University);
- The political orientations of the Ukrainian population, electoral behavior, ethnic and linguistic factors in the political differentiation of the electorate;

- Theoretical and methodological issues in monitoring the socio-structural and socio-cultural characteristics of the Ukrainian population;
- Mathematical modeling of the processes of macro-social changes;
- Inter-ethnic relations (e.g. the level of xenophobia, particularly anti-Semitism) among the main ethnic groups in Ukraine.

KIIS has conducted research on important problems relating to current Ukrainian social policy, e.g.:

- Poverty in Ukraine;
- Employment in Ukraine;
- Social problems in connection with the closure of mines
- Social aspects of ecological problems;
- Study of population health.

KIIS regularly conducts public opinion polls and market research.

Selected surveys conducted by KISS are described in the appendix (p.101).

The Data Bank Project of the Kiev International Institute of Sociology and the National University of Kiev-Mohyla Academy

The Kiev International Institute of Sociology (KIIS) and the University of Kiev-Mohyla Academy (NaUKMA) have made some progress in preparing and establishing the future branch of the National Social Archive. In KIIS the implementation of the idea of a social science data archive started in the simplest form which may be common to all research organization without an established archive. All datasets and survey documents are collected in one place according to a developed folder pattern and are usually followed by a short description. Structure of folders: survey materials are collected in folders according to the year in which a survey was conducted; a folder of a survey contains several standard folders (a folder with data files, a folder with questionnaires in the interview languages, a folder containing pre-test materials, a folder containing a survey report, a folder containing survey documents). Using this archive prototype, KIIS has provided data to the Sociological Department of NaUKMA and social scientists who had requested information for their studies. However, the lack of a search engine and more systematic archiving, which permit more open and regular access to data, became crucial as time passed and the number of surveys increased. The need for good datasets became obvious for internal use, in order not to duplicate surveys, for scientific purposes and for more active involvement of students in secondary data analysis.

With regard to the regulation of access to data, there is no strict legislation in Ukraine. KIIS decides the question of data ownership based on individual agreements with every customer. Every dataset of KIIS is now open to scientific purposes. There are four forms of data access: completely open data, data open only for scientific purposes, data open by request to the customer and data that become open after a certain period of time has elapsed.

In order to get to the next stage in data archiving, KIIS and the Sociological Department of NaUKMA attempted to organize the open Data Bank of Social Research on a non-profit-making basis. It was a decision to introduce an organization according to a new structure which will collect and disseminate data from different institutions which have conducted surveys in Ukraine. In order to reflect the main aim of providing scientific findings for the development of an adequate social policy, the new organization was named "Social Indicators". One of the reasons for establishing the new organization was that KIIS could not provide data on a commercial basis for scientific purposes (potential customers will not be able to buy data). At the same time, KIIS is not able to provide enough support to organize the Data Bank on its own. The need for additional support therefore became obvious. Thus, the first step towards cooperation in the establishment of the Data Bank was made between KIIS and the Sociological Department: KIIS provides datasets and a place for a homepage on its own website, while NaUKMA provides office space (actually in a computer lab), assistance by student volunteers and, of course, a large number of customers.

Additional support was found at the end of 2000. Thanks to a grant from the Canadian Fund of Cooperation, it was possible to start on the project, purchase and install a computer, start work on the development of archiving principles, provide support for software development, and prepare and design a website. "Social Indicators" is now about to start the re-depositing process. The homepage of the Data Bank (<http://www.kiis.com.ua/databank/eng.html>) was completed as part of KIIS's website. This website provides access to data. Any organization, which is allowed to distribute sociological research data, can cooperate with the Data Bank in depositing its datasets.

The Data Bank coordinates work with other Ukrainian institutions (first of all with the Institute of Sociology of the Ukrainian National Academy of Sciences and with SOCIS International). The aim is to develop the Data Bank as part of the Ukrainian Sociological Data Archive. The Data Bank Project is also planning to be involved in international cooperation.

SOCIS International

SOCIS International was created by a group of specialists from the Ukrainian Division of the All-Soviet Center for Research on Public Opinion. In 1997 SOCIS was granted full membership of the GALLUP International Association. SOCIS is now one of the largest and best-known polling firms in Ukraine. SOCIS is accredited with the Sociological Association of Ukraine.

State Committee of Statistics

Relations within the field of state statistics are regulated by the “Law On State Statistics”. There is a State Committee of Statistics and also organs of state statistics in the Republic of Crimea, as well as in regions and cities. Only one census has been conducted in Ukraine (December 2001) since independence. The first results of this census will be ready in April 2002. The State Committee of Statistics has its own website containing some statistical information on the Ukrainian economy and social and demographic data. Every year it publishes a statistical yearbook and brochures containing different statistical information.

The main social science research institutions have established a tradition of cooperation. Here are some examples of this cooperation: The SOCIS supports the Institute of Sociology of the National Academy of Science of Ukraine by providing field work for its research; specialists from KIIS conducted the training courses in interviewing techniques as well as the use of SPSS for the State Committee of Statistics; private institutions continue cooperation in conducting exit polls. This tradition of cooperation provides a platform for developing the National Social Archive as a network of institutions’ archives.

3. Regulations concerning data access

Over the last 10 years the active polling firms, academic structures, universities, centers of public opinion study and analytical firms have accumulated empirical data from hundreds of research projects. Many of these surveys are public and the data can be put into the public domain. However, the data must be properly prepared (structurally and with adequate descriptions) before they can be transmitted to somebody else for secondary analysis. This takes time and effort. Furthermore, the process of transfer and even dialogue concerning transfer involve effort and time. Data from most sociological research remain stored without suitable descriptions in the personal computers of the scientists or in the local computer networks of companies. It means that practically no one uses the data outside the company. Sometimes it is possible to obtain data using personal contacts with heads of firms (when the data are public). In many cases the

agencies which provided the grants for research demand that the organization which conducted research not only publish their results, but also make the data available to other scientists. In such cases the organization normally sends out letters offering the data. On the whole, however, such dissemination is not systematic.

Nevertheless, some data are distributed and used for secondary analysis. The intensity of data utilization for secondary analysis depends on the individual activity of the authors of research. Undergraduate and post-graduate students often use the data for secondary analysis. For example, students from Kiev University and the University of Kiev-Mohyla Academy use data from surveys, which were conducted by the Kiev International Institute of Sociology, the Institute of Sociology and SOCIS, in their studies in courses on methodology and data analysis.

Polling firms and research organizations publish the results and findings of surveys in the form of books or reports and also put tables in the Internet. In 1998 the Institute of Sociology, the “Democratic Initiatives” Foundation and the Center for the Study of Democracy at Queen’s University (Canada) prepared and placed in the Internet a bilingual (Ukrainian and English) archive of Ukrainian public opinion polls (<http://csd.queensu.ca/ukarchive/>). This archive contains the frequency tables of thirteen surveys conducted by the Institute of Sociology and the “Democratic Initiatives” Foundation between 1993 and 1997. All questions are classified according to special three-level qualifiers. Access to this archive is free and available to the ordinary Internet browser.

However, the data from most market research and pre-election research (conducted on the orders of political parties or coalitions) are not normally available for wide-scale use.

Thus, in Ukraine there are currently no regularly functioning, publicly accessible archives (data banks) of sociological data. However, data are distributed (but by no means systematically) and some scientists actively use this data for secondary analysis. Some professors use this data to teach students. No systematic study of data citations in the publications has been conducted.

4. Funding situation of empirical social research

The institutes of the National Academy of Sciences and state universities are financed through a state budget. However, this funding often only covers salaries (which are sometimes delayed), but not research. Different projects have different sources of finance. The main sources of finance are:

- Funds from the Ministry of Education and Science,
- Money from the local budget,
- Money from political parties (in particular pre-election surveys)

- International organizations and funding agencies (in this case for international projects where Ukrainian organizations are the partners)
- Commercial business enterprises (in particular, for marketing research)

Critical problems arise particularly with the financing of long-time projects. The monitoring survey of the Institute of Sociology was partly financed by the Democratic Initiatives Foundation and SOCIS. Due to the lack of stable financing, it is impossible to schedule work for any long periods or start long-term projects.

5. Assessment of the potential for establishing a National Data Archive and views on further development

The need to create a sociological data archive has been discussed by experts in Ukraine for several years. Two years ago a small research group was set up in the Institute of Sociology. The aims of this group were to develop the structure and basis for the organization of the archive, and make preparations for archiving data from the Institute's surveys. In 2001 representatives from the Institute of Sociology, Kiev National Taras Shevchenko University, the Kiev International Institute of Sociology, SOCIS and the University Kiev-Mohyla Academy concluded a semi-formal agreement on the creation of the social data archive. According to this agreement, the archive will be created as an open consortium which will be administered by a council of experts from founding organizations and will have representatives in each of the founding organizations. Until the organizational base for the central office of the archive is created, each founding organization will conduct independent searches for funding and will independently prepare the premises for archiving their own data collections. The potential founders have agreed that it is necessary to coordinate their work, exchange results, develop a uniform technical basis, facilitate the exchange of data collections and consolidate their data collections.

There now follows a list of problems that need to be solved in order to create a permanently operating and publicly accessible social science data archive in Ukraine.

Scientific and technical problems: First of all, an archiving structure must be adopted along with the data storage and search methods. Implementation of these goals requires the appropriate software. A uniform technical basis for archiving is especially important if the archive is being developed not just in one center, but in several organizations in parallel and separately. A logical and physical structure for the archive, as well as a prototype storage and search program have already developed by experts from Kiev University and the Institute of Sociology, and have been presented for usage to the potential founders of a consortium.

Organizational problems: It is necessary to define the status of the archive, the purpose of its existence and the form of work (distribution of data, publishing, consultation on methodical problems), and register the archive officially. Only then will contributors enter data in the archive. It is certain that the archive would disappear after the enthusiasm of its creators is exhausted. A central office, a certain minimum amount of equipment, a minimum number of staff and the possibility of involving volunteers (e.g. students) are necessary for the constant operation of the archive. It is also necessary to create the document complex which would define relations between the donors of the information, the archive and its users. The problems of copyright protection, confidentiality of the information and correctness of data citations are also important. All these problems were expressly considered in the publications in a rubric "Sociological archive" of the journal *Sociology* (1, 2). It is planned to present the first version of the archive at the 2002 fall meeting of the Sociological Association of Ukraine.

Financial problems: A very stable source of finance is necessary for the work of the archive. Every founder now finances its own work independently and is searching on its own for additional sources of finance to ensure continuation of the work. The archive is planned as a non-profit-making organization. A minimum amount of money will probably be received from the budget of the Ministry of Education and Science (through the budget of some of the universities) or from the budget of the Academy of Science. The archive will always have to search for grants (as additional support) to extend its prospects and update its technical base.

Attempts are therefore being made to study and adapt to the DDI DTD (Data Documentation Initiative Data Type Documentation) data description standard.

6. Conclusion

Established organizations within Ukraine understand that there is a need to create a data archive and are keen to do so. Work on the creation of the data archive has already started and some results have been obtained. The information about this work has been published in the professional journal *Sociology*. The Sociological Association of Ukraine is also informed and involved in this work. The prospects for the creation of the archive are good. The extent of the results will depend on organizational factors and the existence of financing.

Appendix: Description of selected studies conducted by KIIS

Study title:	Personality under Conditions of Radical Social Changes – Panel Study 1992/1993 and 1994
Fieldwork dates:	December 1992-January 1993 July-August, 1994
Topics:	Analysis of the relationship between social structure and personality under conditions of radical social changes.
Sample:	Stratified multi-stage random sample. The sample is designed to be representative of adults aged 18+ living in private accommodation in Ukraine. The sample method involved a multistage design: first the districts were selected, and a number of post offices, streets, buildings and apartments were then selected in each district. Finally, the respondent was chosen at the selected dwelling unit.
Sample size:	1992/1993: 2322 respondents 1994: 900 respondents
Fieldwork methods:	Face-to-face interview
Available results:	SPSS dataset; Publications
Access:	KIIS
Study title:	Incomes and Expenditures of Households in Ukraine – Panel study 1995 and 1996
Fieldwork dates:	June-July, 1995 July-August, 1996.
Topics:	Level of well-being of households: sources and amount of incomes, poverty level, characteristics of the most vulnerable groups of the population; main strategies of surviving (including employment).
Sample:	Representative sample of Ukrainian population (including the Autonomous Republic of the Crimea). Random sampling based on households.
Sample size:	1995: 2024 households 4567 individuals 1996: 2322 households 5403 individuals
Fieldwork methods:	Face-to-face interview
Available results:	SPSS dataset; Report, abstract on the results in Ukrainian and English
Commissioner:	World Bank
Access:	KIIS

Study title:	Ukrainian Health Survey 1996 and 1999
Fieldwork dates:	September-October, 1996 May, 1999
Topics:	Health of women, spread of abortions, using contraceptives.
Sample:	Representative sample of Ukrainian women of reproductive age (15-49 years)
Sample size:	1996: 4009 respondents 1999: 9000 respondents
Fieldwork methods:	Face-to-face interview
Available results:	SPSS dataset Frequencies, cross tables; Report
Commissioner:	Ukrainian Ministry of Health UN (1996) USAID, CDC (1999)
Access:	KIIS

Study title:	Social Assessment of the Restructuring of Coal Mining in Ukraine: Mitigation of Adverse Social Impacts 1997-2002
Fieldwork dates	October-November, 1997 November-December, 1999 2001-2002
Topics:	Minors' awareness of mitigation measures in the context of the restructuring program and alternative employment opportunities; assessment of the progress achieved by social mitigation measures and their impact on mines having been transferred to UDKR for closing; consequences produced by mine closings for miner settlements' living conditions; patterns of coping behaviour and their effectiveness for adjustment; proposals regarding improvements of the transfer policies and program.
Sample:	Regional sample, representative for each group of mines ¹ according to the proportion of the number of employed miners by January 1, 1996: group 1: formally closed mines; group 2: mines, which have already passed the initial stage of closing (ongoing closing activities); group 3: mines, which are in the initial stage of closing (transfer to UDKR); pilot mines: mines, which are part of an experimental project.
Sample size:	1400 respondents
Fieldwork methods:	Face-to-face interview, in-depth interview and group discussion

Available results: SPSS dataset;
Report in Russian and English;
Frequencies, cross-tables

Commissioner: World Bank

Access: KIIS

Study title: **Biodiversity Conservation in the Azov-Black Sea Environmental Corridor 1998**

Fieldwork dates: April, 1998

Topics: Protection of biodiversity and assistance for a sustainable development of the coastal and continental regions of the Black and Azov Sea.

Sample: Regional population sample, representative for the Skadovsk district and the Black sea biosphere reserve.

Sample size: 600 respondents

Fieldwork methods: Face-to-face interview, in-depth interview and group discussion

Available results: SPSS dataset;
Report in Russian and English;
Frequencies, cross-tables

Commissioner: World Bank

Access: World Bank

Study title: **Energy Efficiency: The Urban Heating System in Sevastopol 1998**

Fieldwork dates: February-March, 1998

Sample: Regional sample, representative for the adult population of Sevastopol (15 years and more).

Sample size: 393 respondents

Fieldwork methods: Face-to-face interview

Available results: SPSS dataset
Report in Ukrainian and English

Commissioner: World Bank

Access: KIIS

Study title: **Heating system in Public Institutions in Kiev 1998**

Fieldwork dates: February-March, 1998

Topics:	Heating system in schools, kindergartens, hospitals, polyclinics, higher educational institutions, museums, theatres in Kiev.
Sample:	Regional sample: controlled sample of institutions, in which systems of temperature control were installed by the State Committee (correspondingly to the World Bank project in 1998). Additionally, a sample was drawn on the proportion of the inhabitants of each rayon of Kiev.
Fieldwork methods:	Face-to-face interview
Available results:	SPSS dataset Report in Ukrainian and English
Commissioner:	World Bank
Access:	KIIS

Study title:	Changes of Housing Attitudes – Panel Study 1997 and 1998
Fieldwork dates:	March, 1997 (pre-investment survey) December, 1998 (post-investment survey)
Topics:	Needs, perceptions and attitudes of residents related to energy and water consumption as well as efficiency of investments in this field; current state of housing maintenance; change of attitudes of residents towards the energy and water consumption after providing new equipment as well as energy and water services.
Sample:	Controlled sampling of 4 apartment buildings in Dnepropetrovsk
Sample size:	1997: 450 respondents 1998: 406 respondents were surveyed in
Fieldwork methods:	Face-to-face interview
Available results:	SPSS dataset Report (in Ukrainian and English) Frequencies, cross-tables
Commissioner:	World Bank
Access:	KIIS

Study title:	Business in Ukraine 1999 and 2001
Fieldwork dates:	April 1999 April-May, 2001
Topics:	To provide the State Committee for Development of Entrepreneurship with statistical data on Ukrainian small and medium sized enterprises.
Sample:	Representative sample of small and medium sized enterprises

Sample size: 10000 respondents
Fieldwork methods: Face-to-face interview
Available results: SPSS dataset
 Report (in Ukrainian and English)
Commissioner: USAID
 MSI
Access: KIIS

Study title: **Bribes in the Health System 1998**
Fieldwork dates: December, 1998
Topics: Spread of bribes in the Health System of Ukraine, size of payments, influence of bribes on the availability of medical services and on the quality of the medical services, reasons for payments.
Sample: Regional sample of residents of the Donetsk oblast (Kramatorsk and Snezhnoe)
Sample size: 200 respondents
Fieldwork methods: Face-to-face interview, in-depth interview and focus group discussion, diaries
Available results: SPSS dataset;
 Report (in Ukrainian and English)
Commissioner: World Bank
Access: KIIS

Note:

- 1 According to the Resolution No. 280 of the Cabinet of Ministers, March 28, 1997.

References:

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- (2) A. Gorbachyk, Social Data Archives: Purposes and Problems of Formation, Methods of Use. In: *Sociology: Theory, Methods, Marketing*, **1** (2000), p.130-144.

Yugoslavia

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1. Empirical social research before 1989¹

The development of empirical social research in Yugoslavia started in the 1960s following the establishment of research institutions (see p.108), journals² and professional associations³. The 1950s can be regarded as a period of preparation for this development. This period was marked by the successful conclusion of debates with dogmatic Marxists (conducted primarily in the field of philosophy), which created the conditions for a critical examination of social phenomena. At the end of the 1950s and the beginning of the 1960s university courses in sociology, political science and psychology⁴ were introduced, thus creating the basis for the education of the necessary cadres. During the 1960s the institutional basis for social research was expanded through the establishment of social science faculties in a number of regional centers and through the formation of university-based and non-university-based research institutes. These institutions developed relations and started cooperating with corresponding institutions in European countries and other states. During the 1960s intensive pioneering research work was carried out, including the first empirical studies on social structures, processes of industrialization and urbanization, political elites, public opinion, etc. The special Yugoslav characteristic of research was the study of self-management. The majority of the sponsors of systematic empirical research were non-university-based institutes. The major role of universities was educational, while university-based institutes carried out research only occasionally; their staff were recruited from university lecturers, who were therefore mainly oriented towards educational activities. This was not a very convenient solution since dualism between theoretical and empirical research had already then been established. The former was characterized by a radical-critical approach, while the latter was overwhelmingly positivistic. The material position of science, however, was rather favorable: research work and empirical studies were financed from the state budget. However, research work lacked high-quality projects rather than essential finance.

The beginning of the 1970s was marked by several events which had a rather unfavorable effect on the development of social research during this decade. The first event was the attempt to democratize society through decentralization. This resulted in the establishment of autocratic natiocracies in all of the republics of Yugoslavia. The second event was that the planning, organization and funding of scientific research work were decentralized in such a way that they resulted in atomization, weakening of cooperation between republican centers and their increasing dependence on their respective natiocracies. The third occurrence was rather similar avoidance of critical research on

social phenomena by the republican authorities and political pressure on researchers (along the Communist Party membership line). The interference of political factors in research work led to the stagnation of social research, i.e. to reorientation towards less “dangerous” areas. During this decade researchers continued to study social structures, demographic changes, population trends, values, ethnic relations, social welfare problems, the family, youth, political activism, religion, media and communication, public opinion and other topics.⁵

Although the dualism between education and empirical research was maintained with regard to institutional arrangements, university lecturers started to become increasingly more involved in research work by non-university-based institutes. Unlike university institutes, non-university-based institutes, owing to their empirical orientation, had the logistics required to conduct research: networks of interviewers, coding teams, programmers, equipment, etc. University staff often used the research findings of non-university institutes for master’s and doctoral theses and other academic papers.

At the beginning of the 1980s Yugoslavia entered a general crisis in terms of economics, politics, ethnics, morals and values. Professional solidarity among researchers of social phenomena gave way to closer relationships with their respective natiocracies in the situation of clashes, which were characterized by ideologization of all social conflicts as ethnic conflicts. Because of the lack of financial resources and the inability to obtain funds from different federal units, funding of research work decreased to a level which was just enough to maintain the existence of researchers and ensure their mere survival. As a result of this, theoretical work was partly revitalized while the financiers of empirical research became almost exclusively government bodies and political organizations and communities. They were interested in research results as a means of reforming society and for their own survival (remaining in power). The attention of researchers in the 1980s was directed towards the then existing Yugoslav society and processes of change and development. The formerly dominant critical Marxist discourse was replaced, or at least enriched, by references to prestigious social science authors from Western Europe and the USA. It was indicative that formerly compulsory (yet ritually used) terms like “socialism”, “self-management”, “Marxist”, etc. started disappearing from books, academic papers, conferences and research projects.

The end of the 1980s also saw the end of the former “Second” Yugoslavia. Established as a state comprising five nations, three religions, three languages, two alphabets and one political party, it passed into history as the state with another sixth nation and with 250 political parties. The newly created states in its territory are no longer at war, but their relations and connections in all fields have been torn apart so that cooperation between social phenomena researchers are only now in 2001 showing the first faint signs of revitalization.

The results of empirical research between the start of the 1960s and the end of the 1980s are only available in publications – books, collection of papers and journals. From the mid-1980s onwards some research institutions started keeping their empirical data on computer disks, but this practice was an exception rather than a rule until the beginning of the 1990s. Preservation of the data on individual empirical research in the form of a data set was only established as a regular practice at the end of the 1990s.

Between the beginning of the 1960s and the mid-1980s, Yugoslavia and Poland could be regarded as the two Eastern European countries with very developed research activities in the field of social sciences. This situation was largely due to greater openness in Yugoslavia towards the international scientific community and more tolerant relationships between the authorities and researchers. Regular campaigns against and punishments of critical authors and intellectuals were usually minimized by professional solidarity at home and abroad. At the beginning of the 1980s Yugoslavia could not, in relative terms, keep pace with the rapid development of research in Hungary and Czechoslovakia, and from the 1990s onwards with other Eastern European countries either.

2. Development of empirical research since 1989 and description of data collections produced by academic social research institutes⁶

Academic social research institutes

In Yugoslavia there are three Academies of Science: one in Serbia (The Serbian Academy of Science and Arts) and two in Montenegro (The Montenegrin Academy of Science and Arts and Doclean Academy of Science and Arts). Although the first two embrace institutes, neither of them belongs to the field of social sciences. Therefore, academies do not carry out social empirical research.

There are seven academic research institutes involved in research work. All of them are based in Belgrade, the capital of Serbia. In addition to these organizations, there are several other social science institutes (economics, political science). Although they do not carry out empirical research, they use secondary analysis of the available data. The following institutes are actively involved in empirical research on social phenomena⁷:

- Institute of Social Sciences, University of Belgrade;
- Institute for Criminological and Sociological Research;
- Institute for Pedagogical Research;
- Institute for Psychology of the Faculty of Philosophy, University of Belgrade;

- Institute for Sociology of the Faculty of Philosophy, University of Belgrade;
- Institute for Political Studies;
- Institute for Philosophy and Social Theory, University of Belgrade.

A common problem shared by all these institutes in the period analyzed concerns finance. All the above-mentioned institutes are financed by the Ministry of Science and Technology of the Republic of Serbia⁸. In 2001 the planned total expenditure on scientific research was only 0.24% of Serbia's Gross Domestic Product (the real figure was 0.14%). The entire field of scientific activity is therefore just barely surviving. Compared with 1990, gross domestic product has fallen by 50% while the part of the budget for funding science has been reduced fivefold. This means that science as a whole has ten times less financial resources than in 1990. Since 1980 the Ministry has not funded any empirical research, but only covered the salaries of the employees and occasional purchases of books, journals and equipment. The planned percentage in 2002 is 0.2%.

The institutes therefore have to rely on the market as the source of empirical research, i.e. on private enterprises (which are almost entirely disinterested in social research and/or themselves face financial troubles), government bodies and organizations, political organizations, the NGO sector (from abroad), international foundations, agencies, media, etc. Since 1997 NGOs and foreign foundations have followed a policy of not financing any empirical research in Yugoslavia, they only hold conferences, publish books and journals, travel abroad, etc.. However, it should be noted that prior to this date international NGOs and foundations gave very substantial financial assistance to research work, book and journal publishing, as well as specialization and international training for a number of researchers. By financing summer schools, courses and other forms of alternative education, they also helped many researchers to survive difficult years of low funding, in particular during 1993 which was characterized by a rate of inflation of one billion percent.

The problem which financial hardship causes is the lack of interest among young people in working in the research institutes: the salaries of university lecturers are twice as high and they have additional means of earning income by taking part in the projects which are carried out by the institutes organized at the university faculties. The faculties are financed by the Ministry for Education and the Ministry for Science and Technology. At the same time, it is easier to promote university lecturers to higher positions than in the institutes, as the requirements for academic positions are lower than for research positions. A large number of young scholars have gone abroad, while many of them acquire jobs in the NGO sector, in political parties, private market agencies, media and similar institutions (where the salaries are between three and ten times higher). The majority of the employees in research institutes are older people and women (in Yugoslavia this is a very general indicator of the non-attractiveness of this job).

Since the establishment of the “third” Yugoslavia, the vast majority of research work in research institutes has had a pro-opposition orientation. Almost right to the end, the regime of Slobodan Milosevic did not try to disseminate research work and the criticism of the regime contained therein, except by exhausting the finances of research institutions. The Ministry for Science and Technology of the Republic of Serbia did not discriminate against pro-opposition institutes or their researchers in regular bids for project financing, but often “redirected” the very low funds planned for financing science to other purposes or to pro-regime-oriented institutes. Of course, a number of researchers were on the “black list” of the state media and pro-regime publishers. However, they were able to publish their works in academic journals and independent publishing houses, participate in conferences at home and abroad, and appear in the alternative media, all up to a point which guaranteed their isolation from the mass public.

The weakening of the regime was accompanied by its attack on the freedom and autonomy of universities, i.e. by the establishment of partial control over universities. When pro-opposition university staff were sacked from universities (1998-1999), the situation in which they found themselves was alleviated by the creation of alternative educational institutions which were financed from abroad. The institutes were spared somewhat from this attack, primarily because they were not involved in work with students. The regime’s plan for imposing control over the institutes (a draft law had already been prepared) was “forgotten” when the regime faced serious threats to its survival from 1997 onwards. Control over institutes was carried out through management boards, composed of the representatives of the nomenclature of the ruling parties. In the last two years of its rule, the regime had practically no loyal intellectuals.

The international community had a controversial influence on the development of science in Yugoslavia. On the one hand, international funding of a number of research projects and assistance for researchers helped science to survive. On the other hand, the international sanctions imposed on Yugoslavia in 1992 affected it in a very negative way. The sanctions effectively blocked exchanges between Yugoslav researchers and the international academic community: the importation of international journals and books was stopped, traveling abroad was made more difficult and a majority of international projects were halted. Researchers were punished twice – by their own government and the international academic community. Personal contacts and solidarity of foreign colleagues lessened the effects of the sanctions to some extent, but this was not enough to compensate for the lack of international cooperation. The change of regime in October 2000 had a significant impact on the freedom of scientific work and openness to the world. However, the financial status of research institutions has not yet changed. It is important to stress the role which public opinion surveys played in removing Milosevic’s party from power. The results of public opinion surveys before the 2000 elections put strong pressure on opposition parties to form an united coalition

by demonstrating that this was the only way to win the elections. On the other hand, these surveys increased the self-confidence of opposition-minded voters by showing them that an anti-regime mood was widespread and that no attempts to forge the election results could significantly distort the election outcome.

Institute of Social Sciences

Established in 1957. Part of the University of Belgrade since 1981. Staff: 60 full-time employees. Out of five centers, three carry out social empirical research:

1. Center for Political Studies and Public Opinion Research,
2. Center for Demographic Research, and
3. Center for Sociological Research.

1. Center for Political Studies and Public Opinion Research

1963-1989

An independent Center for Political Studies and Public Opinion Research was set up in the Institute of Social Sciences in December 1963 (with four regular programs: a program of public opinion research; a program of research on (mass) communication; a program of research on voters' political and electoral behavior; and a program of theoretical and methodological research). The Center was the first and, for many years, the only institution of its kind in the then socialist countries and in the Balkans. Since a large part of the data presented to the public were primarily political in content, conflicts between the Center and the regime were inevitable.

Between 1964 and 1971 the Center conducted annual surveys of Yugoslav public opinion with an omnibus character. The results and analyses were published in a series of collective annual publications (Yugoslav Public Opinion on Current Political and Social Issues, 1964, 1965 and 1966, and Yugoslav Public Opinion on Current Economic and Social Issues, 1964, 1965 and 1970) and a series of collective and individual studies (e.g., *Ethnic Distance in the Socialist Federal Republic of Yugoslavia [SFRY]*, *Public Attitudes Towards Authentic Values in Culture and Barometer of Public Satisfaction and Dissatisfaction*). The Center also conducted snap inquiries on the reaction of citizens to current political events (e.g., *Public Reactions to the 1968 Student Protests and Public Reactions to the 21st Session of the Presidency of the League of Communists Central Committee [LCYCC]*). The public opinion research program included special surveys, either with respect to specific themes of research or the views of particular social groups (e.g. *Yugoslav Public Opinion on the League of Communists and the Forthcoming Congress*, *Yugoslav Public Opinion and the Eighth Congress of the LCY*, *Yugoslav Public Opinion on Economic Reform*, *Yugoslav Public Opinion and Economic*

Problems, Farmers' Public Opinions on Current Problems of the Village, Yugoslav Public Opinion on Current Problems of National Defense, Aspects of the Public Opinions of Young People, Yugoslav Public Opinion – Attitudes of Youth and Attitudes Towards Youth and Citizens' Reactions to Unemployment).

As part of its research on political and electoral behavior, the Center conducted surveys on the elections in 1965, 1967 and 1969, the results of which were published in a series of books entitled *Parliamentary Elections in 1965, 1967 and 1969*. In 1966 it organized a symposium entitled "The Electoral System in Conditions of Self-Management" and published the papers in a book with the same title. The studies "The Republican and National Composition of Employees of Federal Bodies" and "Voters' Participation in Federal Parliamentary Elections" were also published. Within the program of research on mass communications, research was carried out on the circulation and influence of the mass media in Yugoslavia (*The Mass Media in Yugoslavia*), the circulation, content and influence of certain domestic newspapers, as well as foreign propaganda (*Yugoslavia in the Foreign Propaganda Program of Foreign Radio Stations, Foreign Propaganda in Yugoslavia*). Two books were published within the framework of this program: *Mass Communication as a Scientific Discipline and Freedom of Information and Propaganda in the Contemporary International Community*.

As far back as 1964 the Center started international academic cooperation, initially with similar institutions in the USA and later with institutions in Western Europe (there were still no institutions of this kind in Eastern Europe and the closed regimes in that part of the world did not tolerate international cooperation). Foreign expertise and financial assistance, international competition and the affirmation and opportunity for synchronized comparisons through joint research were the main motives for the Center's participation in international research projects such as *The Transformation of Values in Yugoslav Society*, *The Prestige of Professions or Forms of National Identification*. However, one international project from this period proved almost fatal for the Center's continued existence. The Center's staff participated as the complete equals of their partners in the USA and a number of Western European countries in the project *Opinion Makers in the Modern World*, as illustrated by a series of publications (*Opinion Makers: Theoretical and Methodological Issues, Yugoslavia's Social Structure and the Formation of Public Opinion, The Structure, Mobility and Social Circles of Opinion Makers, Values, Attitudes and Views of Opinion Makers, Forms of Communication: Influence on Opinion Makers and the Influence of Opinion Makers*). However, the regime at that time was totally unwilling to become the subject of research that dealt with political and social elites. Before the end of the incident provoked by this project, the Center was used as a tool in the conflict between conservatives and liberals, and this brought the first phase of its work to an end. The Center was labeled as politically subversive

and became unacceptable to political organizations and communities. The stigma of being supporters of the liberals, combined with the findings of public opinion polls which presented the regime with a less pleasing image of itself than hitherto, were enough to warrant the abolition of systematic research on Yugoslav public opinion.

In an effort to compensate for the deficiencies in this program of public opinion research, the Center turned towards problem-oriented research. Since political organizations and communities were almost the only source of finance for empirical research, the Center sought financial support from less rigid political groups. Permanent research arrangements were established with the City of Belgrade in 1972, the Serbian Youth League in 1976 and the League of Communists of Yugoslavia in 1984. Several series of books and other publications by single or collective authors emanated from this research; the majority were published by the analytical and research departments of the above-mentioned organizations. The titles of these publications illustrate the directions of research in this period: *The Nature of Interests, The Interests of Young People, The Values of Serbian Youth, Attitudes and Orientations of Yugoslav Youth, The Socio-political Engagement of Youth, The Socio-economic and Material Position of Youth, The Social Activism of Young People in Serbia, The Political Socialization of Young People, Culture and Youth, The Free Time of Young People, Public Forums in Belgrade and The Consciousness and Engagement of Communists*. At the end of this period the Center conducted a poll on the extent of religious belief in Belgrade, the results of which were published in five separate publications.

In addition to research under these three long-term arrangements, the Center devoted a great deal of attention during this period to research on communication, including research on communication at work and in political organizations and communities: *The Information System in Self-Management Decision-Making, Information in Work Organizations and the Expression of Interests, Information and the Development of Self-Management Relations in Organizations of Associated Labor, Information Processes in Socio-political Organizations*. It also conducted surveys of the content, circulation and influence of mass media. There was also a series of surveys of news and propaganda activities directed from abroad towards Yugoslavia and from Yugoslavia abroad: *The Dissemination of Foreign Printed and Radio Propaganda in Yugoslavia, International Communication Today and the Objective Conditions for Yugoslavia's External Propaganda Activities, Yugoslavia's System of External Informative and Propaganda Activities, Yugoslavia's Image in the Foreign Press, Foreign Images of Yugoslavia and Directions, Possibilities and Resources for Yugoslavia's External Informative and Propaganda Activity*. Finally, there were varied polls on the media: *Mass Communication in Serbia, The Openness of Yugoslav Television to Foreign Influences, The Incidence of Reports from Foreign Sources in Serbia's Media, The Knowledge of Yugoslav Citizens About Important Social Questions, Young People in the Mass Communication System and The Presentation of Belgrade in the Yugoslav Press*.

This phase of the Center's life produced considerable theoretical efforts and some noteworthy achievements. The specialization of the academic staff and the research themes encouraged attempts at theoretical generalization. The best of these were studies produced by staff members for their own personal promotion or to gain academic qualifications, but were nevertheless still part of projects for scientific funds (Value Orientations, Personal Characteristics and Class Membership, An Approach to the Study of the Value Dimensions of International Television Exchange, The Science of Communication, Mass Communication in the Modern World, Intercultural Communication Through the Media in a Multicultural Society, The Processes and Function of Early Political Learning and The Role of the Press in Political Socialization). The Center's rich fund of accumulated data was extensively used in these works. From the 1970s onwards the Center's collaborators appeared increasingly as authors of articles in scientific periodicals and papers delivered at scientific conferences at home and abroad, or as co-authors of projects conducted by other scientific institutions in Yugoslavia.

In the mid-1970s the Center had shifted the focus of its attention from suppressed and unchallenging research on public opinion to research on political relations as determinants of social consciousness. The reorientation towards political problems was manifested in a move towards political institutions, organizations and ideology in projects that were carried out by some of the Center's collaborators for the Republican Scientific Fund. Theoretical and comparative studies based on the appropriate foreign literature in the fields of political science and political sociology (Political Sociology, Ideology and Social Reality and Modern Political Parties) created a theoretical basis for the Center's concentration on political processes and institutions.

At the start of the 1980s Yugoslav society found itself in a deep political, economic and moral crisis. Public opinion surveys revealed a weakening of identification with the regime, a decline in the reputation of the League of Communists and widespread dissatisfaction of citizens with the social situation and their own positions. Economic stagnation and the state of ethnic relations provoked a high level of dissatisfaction. Ethnic relations were judged to be bad at the Yugoslav level, although relations within smaller territorial units (except Kosovo and Metohia) and multinational communities (Bosnia-Herzegovina and Voivodina) were considered good or at least satisfactory. This was supported by the assumption (dear to researchers) that the perceived ethnic tensions were primarily the result of clashes between the republican national bureaucracies in their struggle for a dominant position within Yugoslavia, while the mood of the general public remained within the bounds of openness and national tolerance. Although unsystematic and partial, empirical evidence suggested that public opinion was beginning to change, and national affiliation was becoming more important than all other social and demographic characteristics as the factor that distinguished

and homogenized citizens with otherwise very different views. This change was at that time quantitative. Only surveys conducted in 1985, 1986, 1989 and 1990 revealed a qualitative change in the determination of public opinion marked by the complete domination of national affiliation over all other group characteristics.

At any event, as a result of the crisis at the start of the 1980s, the general public woke up from its lethargic satisfaction and realized that its future was not in either its own or good hands. Groups and movements outside the formal institutional system appeared at that time and articulated a political alternative. The young, educated and qualified part of the public accepted these alternative ideas, but the bulk of the public remained for some years politically passive, its dissatisfaction diffuse and undefined. All these changes were nevertheless early signs of a revival of public opinion and they induced the regime to revive research on the mood of the general public. Faced with a social and political crisis and divisions within its own ranks, the League of Communists of Yugoslavia resorted to public opinion research as a way of obtaining information about the mood of its members and the general public. The Center conducted surveys (whose results were published in the books "Yugoslavs on the Social Crisis", "The Youth of 1986" and "Children of the Crisis"). The end of this phase of the Center's activities was marked by the last survey of public opinion in the "second" Yugoslavia, which the Center conducted in 1990 for the Federal Government in cooperation with university institutes in Ljubljana, Zagreb, Sarajevo and Skopje. The results of this survey were published in the book *Yugoslavia at a Turning Point in Crisis*. This survey was also the last time that customers showed ambitions to control the timing of the release of some of the findings. As far as the customers were concerned, all research in this period was motivated by the determination of the regime to hold on to power at all costs, although the price of doing so was initially cosmetic changes and in the end a sharp break with the norms and values of its own ideological system. The regime wanted to find out what changes the general public saw as necessary and inevitable, and the extent to which it would tolerate the everyday frustrations that resulted from planned reforms.

A feature of the Center's activities in this period was intensive empirical work. In addition to the above-mentioned surveys, the Center completed and published the following studies: *The Social-political Organization of Youth*, *The National Consciousness of Serbian Youth*, *The Political Culture of Serbian Youth*, *Changes in the Value Orientations of Serbian Youth*, *The Social Consequences of Unemployment*, *Belgraders on Social Differences*, *The Thirteenth Session of the LCYCC* (a study of activities that included observation of discussions in basic party organizations) and *Interests and Engagements of the League of Communists*. These and other studies of republican or Yugoslav themes demonstrated that the liberation of the general public from the debilitated values of an out-dated ideological system was in full flood and

that the differentiation and homogenization of the public on a national basis were both widespread and profound. While the first change provided a basis for predictions that society would move towards democracy, the second was a warning that the “second” Yugoslavia would inevitably break up.

Anti-communism and nationalism were the ideological and political tenets of all the newly-formed political movements that were later legalized as political parties, although the alternative to communism was formulated, if at all, in only the most general programs, or, as in the case of the market economy, was accepted by the public only in principle. During the general collapse of accepted values and the confusion that characterized the public mood in this period, traditional values and traditional determinants of personal and group identity proved most resistant to the crisis. They offered salvation and a safe haven from traumatic realities. Nationalism and religious revivalism came to the forefront in the Yugoslav political scene and filled the vacuum left by the collapse of the communist regime. The results of public opinion research published in “Yugoslavs on the Social Crisis” and “Children of the Crisis” provided the first indications, while the results published in “Yugoslavia at a Turning Point in Crisis” were a clear signal of the country’s inevitable break-up. All social conflicts had already been translated into national problems, public opinion was divided and homogenized on the same basis, and the national bureaucracies were widely accepted as the genuine and only champions of national interests.

Another feature of the 1980s was that the Center finally acquired competitors. On the eve of the break-up of Yugoslavia, the hunger for information on the views of the general public and political factors led to a veritable flood of regional, republican and Yugoslav research projects. Although some were no more than amateur improvisations using small samples and dilettante methodology (whose findings could be indicative, but never representative), there is no doubt that the sharp increase in research reflected a legitimization of public opinion and public opinion research, resulting from the fact that the general public now gained the status of an unavoidable factor in political life. The competition gave birth to a number of institutions that, thanks to the application of professional methods, took their place in the small world of public opinion research. Competition had a positive effect on the Center, because it encouraged staff to use their competitive advantages – experience, organization of work, quality and the ability to analyze research problems theoretically. The break-up of the federal state and its institutions, the disappearance of virtually all the organizations that had financed the Center’s empirical research, the disappearance of the “second” and the appearance of the “third” Yugoslavia, and especially the legalization of the multiparty political system were the special stimuli for the Center’s research work.

1990-2001

At the start of the 1990s, after the legalization of a multiparty political system in the fall, the social climate for public opinion research became very different to what it had been before. Firstly, the fact that political parties had been legalized was in itself a sign of democratization. The existence of political parties and the holding of multiparty elections strengthened the role of the general public in political life. They ended the certainty of unlimited rule by one party because power was now won and lost in multiparty elections. The mood of the public, or at least the electorate, was of great importance to political parties, particularly in the period leading up to elections when electoral programs and speeches are adapted to fit the mood of potential voters. Secondly, the general public became politically active. The processes of party identification, which began before the first multiparty elections, are still continuing. Thirdly, in their party manifestos and electoral programs the parties presented a variety of political and ideological choices to the general public. These programs encouraged the public to make political choices, while having an opinion on a social or economic problem was no longer conformism or merely permitted divergence from the almost completely rigid patterns of the single ruling ideology.

However, despite a general improvement, conditions for research on public opinion remained far from good. Political parties cannot be expected to initiate and finance public opinion surveys except for their own needs and interests. This means, on the one hand, that they can be counted on to finance research primarily only in pre-election periods, while, on the other hand, the results of opinion polls are not published unless, of course, they are very favorable to the party concerned. The private sector is still too weak to provide a permanent source of finance, while state institutions (above all the federal or Serbian republican governments, which are the most logical source of finance for systematic research on public opinion) have not shown any interest in this kind of undertaking. The illusion that political organizations are interested in public opinion research has been created by surveys conducted before elections, which have taken place nine times in Serbia in the period 1990-2000. Almost all institutes and agencies for public opinion research manage to find financiers among the parties and the media. The Center itself has therefore relied primarily on the media for research during electoral campaigns and periods between elections.

An equally serious problem in this period was the low level of public opinion culture. One already historical example of this was the reaction of one opposition party to the Center's forecast of the results of the December 1990 elections. The accusations that the Center had falsified the findings of its survey of the party affiliations of Serbia's voters made the regime's criticisms of the Center in the late 1960s and early 1970s seem like a mild and friendly rebuke. At this time political parties and their supporters in the media judged research solely according to how favorable it was to the party making the judgment. The passage of time, in which the reality of electoral results has diminished the illusions of the parties, has ensured that this kind of extreme reaction

no longer occurs. Of course, the Center has also had exceptionally good experience with newspapers and journalists, some of whom are entirely capable of presenting the results of public opinion research in journalistic fashion. The mass media were the main or an important source of finance for the Center in this period. The general public also lacks a developed public opinion culture. Some people are still hesitant to express their political views, and people's confidence in the reliability of public opinion research as an indicator of the views of the public as a whole is often limited, partly because of limited experience, and partly because individuals often base their judgments on how favorable the results of surveys are to the parties they support.

At the present moment the Center has 10 full-time employees (political scientists, sociologists and psychologists), five holding a Ph.D. degree, three a MA degree, and two university graduates. Five of the Center's collaborators are on the list of the top ten academics who have been cited most often in the Yugoslav scientific journals in the past ten years.

The part-time staff include 24 consultants (university professors and assistants, collaborators of academic institutions) who are engaged temporarily according to needs for specific topics and projects; Permanent network of field researchers: 155 selected psychologists, sociologists and political scientists in Serbia and Montenegro, specially trained to carry out face-to-face interviews; Data-processing service: 15 selected students of psychology, sociology and political science, specially trained for data coding and technical procedures concerning content analysis; Monitoring group: 10 selected psychologists, sociologists, political scientists and journalists in Serbia and Montenegro, specially trained to monitor, analyze and evaluate media content; Presenter group: 10 selected psychologists, sociologists and political scientists, specially trained to present focus group discussions.

During the past few years the Center has focused on research work in the following fields: *Public opinion surveys* using Yugoslav, Serbian, Montenegrin, regional and special samples: regular omnibus or specialized polls concerning political, economic, ethnic and other social issues, trust in institutions, parties and political leaders, attitudes towards international institutions, organizations, states, personalities; election predictions; *Research on specific phenomena*: political and election behavior, political parties, electoral system, political culture, political marketing, political motivation, values, corruption, "gray" economy, social and political elites, non-governmental organizations; *Media research*: media system, functioning, media exposure, consumption, audience structure, credibility, media content, effects; *Political consulting*: identification of problems, recommendations for short-term political action, "images" of parties and leaders, pre-election and between-election campaigns, motivation; recommendations for long-term strategic political action – solution proposals and problem-solving methods, effects forecasting; *Theoretical analysis*: problems of transition and democratization, comparative analysis of processes in Eastern Europe; *Selection, training, control of work of the field research network*, Data-processing

service, Monitoring group, Presenter group; *Publishing*: Publishing of books, collection of works and other publications resulting from the work of the Center; Presentation of results to the academic public (articles in domestic and international journals, organization of and participation in domestic and international conferences, congresses, round table and panel discussions, etc.), and to the general public (press conferences, appearances in media, etc.); Computer database of empirical surveys (updating).

The Center conducted 83 empirical surveys in the period between 1990 and 2001 for domestic and foreign clients (19 based on Yugoslav, 47 on Serbian and 17 on Montenegrin samples) (see appendix p.132). Two of these surveys were historical milestones for the Center: the research on the 1990 elections, the findings of which appeared in "From Election Rites to Free Elections", the first book published on Serbia's multiparty elections; and the survey of Yugoslav public opinion in 1992, which was the first study of this kind in the "third" Yugoslavia. The Center also organized three round table discussions on the elections. The Center is the only research organization in Yugoslavia with a computer database encompassing all the Center's surveys from 1988 onwards (88 surveys in total). Access to the computer database is possible on commercial grounds or on a reciprocal principle. However, not all surveys are accessible to the public due to a full or partial embargo imposed by clients on the results of particular surveys.

Although the Center devoted equal attention in its empirical research to election surveys and general surveys of public opinion, there was a great level of disproportion in the publication of the results of both types of survey. The explanation for this disproportion lies partly in the greater interest of the academic and general public in electoral studies, and partly in the interests of the researchers themselves (especially as they were permanently engaged in a project on parliamentary government financed by the Republican Scientific Fund). It is also clear, however, that frequent elections and continuous party power struggles have made electoral research more topical and useful, and pushed general surveys of public opinion into the background, making them appear less relevant for an understanding of the social situation. Empirical research on the media was also neglected in this period, although the above-mentioned surveys included data on the use and preferences of the media.

The neglect of public opinion research by comparison with electoral research demonstrates primarily the instrumental relationship of political organizations (in the first place parties) towards this research. Pragmatic goals (information on voting intentions, the popularity of party leaders, the planning and adaptation of political campaigns, the determination of popular reactions to the behavior of the parties, etc.) demonstrate the political instrumentalization of public opinion research in the broadest sense of the term. It would be difficult not to understand why parties have such an

attitude towards public opinion research, but this phenomenon shows that the problem of the systematic and continuous supply of political actors with information on the public's mood and the problem of supplying the public with feedback on its own opinions has still to be resolved in this country.

The Center is considered to be the most prestigious institution in Yugoslavia in view of the quality of public opinion polls and other empirical surveys. It applies modern research methodology based on highest international standards. Theoretical achievements of the Center's staff have been published in numerous books and academic journals. From the very beginning the Center has cooperated with numerous academic and research institutions throughout the world, either as a partner (Columbia University, New York; California University, Barclay; State University of Florida, Tallahassee; City University of New York, New York; University of Michigan, Ann Arbor; Russian Academy of Science, Moscow; University of Berlin), or as a member of international consortiums (World Consortium for the World Values Survey; World Consortium for Comparative Analysis of Electoral Systems). The Center has carried out a number of surveys, polls and media projects in Yugoslavia for foreign clients on a commercial basis (USIA, Washington, DC; InterMedia Survey Institute, Washington, DC; Open Society Fund, Belgrade; Friedrich Ebert Foundation, Bonn; USAID/OTI, Belgrade; UNDP, Washington, DC; Penn, Schoen & Berland, Washington, DC – New York; Greenberg, Quinlan & Rosner Research, Washington, DC – New York).

Since the introduction of the multi-party system in Yugoslavia, the Center has conducted nine pre-election polls including election predictions. All of them came far closer to the official election results than any other prediction, while seven (in 1990, 1993, 1996, September and December 2000 – Serbia, and in 1997, 1998 – Montenegro) were characterized by minimal deviations from the election outcomes. The Center's expert team conducted a series of surveys and elaborated strategic plans of action concerning the 1997 presidential elections in Montenegro (for the Democratic Party of Socialists), the 1998 parliamentary elections in Montenegro (for the Democratic Party of Socialists), the 2000 local government elections in Montenegro (for the Democratic Party of Socialists), the 2001 parliamentary elections in Montenegro (for the Socialist People's Party), the September 2000 presidential and federal parliamentary elections in Serbia (for the Democratic Opposition of Serbia) and the December parliamentary elections in Serbia (for the Democratic Opposition of Serbia).

In addition to the above-mentioned pre-election surveys, the Center conducted 14 election surveys, 12 political consultation surveys, ten media surveys and 48 public opinion surveys in 1999 and 2000. Between 1997 and 2001 the Center conducted ten rounds of monitoring and analysis of the RFE/RL Program in Serbia and Montenegro six rounds of focus group discussions and analysis of RFE/RL in Serbia; four rounds of

focus group discussions and analysis of VOA in Serbia, two rounds of focus group discussions and analysis of Deutsche Welle in Serbia, two rounds of focus group discussion and analysis of domestic media and two rounds of focus group discussion and analysis of RFE/RL in Montenegro.

The findings and analysis of conducted elections, public opinion and media surveys were published in articles in scientific journals and in books. Besides those already mentioned, they include: *Challenges of Parliamentarism – The Case of Yugoslavia in the Early 1990s* (in English, 1995), *Between Denial and Support – Public Opinion on the Legitimacy of the Third Yugoslavia* (1977), *Elections to the Federal and Republican Parliaments of Yugoslavia (Serbia and Montenegro) 1990-1996* (in English, 1998), *Political Marketing* (2000), etc.. The data from conducted surveys have been largely publicized and cited in domestic and foreign media.

Standard sample models are quota or probability, multistage, stratified, proportional samples. Sub-samples include Voivodina, the Belgrade area, Central Serbia and Montenegro in proportion to their size. Quota criteria are: stratum (urban – rural), gender, age, level of education and ethnic background of respondents. These models apply stratification in three stages (region – county – municipality) with a random choice of segments. The standard sample size is 1400-2000 respondents for Serbia, 1000-1800 for Montenegro, and 2000-3200 for Yugoslavia. Other sample models are: snowball, panel, area, cluster, etc..

Standard data collection techniques include face-to-face interviews, group interviews, in-depth interviews, panel surveys, focus groups, content analysis, media monitoring, observations, telephone interviews, etc.. The interview, i.e. the questionnaire for asking questions and registering answers, includes various instruments: attitude scales (Likert), knowledge tests, evaluation scales, batteries of closed questions, open-ended questions, projective questions, demographics, etc. The interview procedure is a standard one: respondents are guaranteed anonymity and are free to accept or reject the interview. The refusal rate in the Center's surveys is relatively low (on average around 13% for probability samples and less than 10% for quota samples).

2. Center for Demographic Research

Set up in 1962. Seven full-time members of staff. The Center has carried out a number of research projects on population (birth rate, fertility, population policy, migration, etc.) either on its own or in cooperation with the federal, republican or local statistical bureaus. It is known for its high-quality forecasts of population trends based on a special methodology. Due to the lack of an updated population census, these forecasts are the most reliable source of information on population. The Center has been publishing the journal *Population* since 1963. The study "Family planning as a lifestyle" (1999) contains many empirical data used as secondary sources for analyses.

3. Center for Sociological Research

The Center for Sociological Research conducted very few empirical studies during the 1990s. It focuses primarily on theoretical analysis of the crisis in Yugoslav/Serbian society and the process of transition. Before 1990 the Center for Sociological Research conducted several empirical studies: *Desires and Fears of the Peoples of Yugoslavia* 1965, *Yugoslav Students and Socialism* 1966, *Social Position and Orientation of Rural Youth* 1971, *Ethnic Belonging and Values of High School Youth* 1973, *Social Strata and Social Consciousness* 1977, *New Directions of Social Structure Change* 1989. The results of these studies are published in books of the same titles.

Institute for Criminological and Sociological Research

This organization was set up in 1971 as the result of a merger between the Institute for Criminological and Criminal Research (established in 1960) and the Institute for Sociological Research (1961). It has 39 full-time staff and is state-owned. The Institute is involved more in criminological research than sociological research. Recent research within the latter area includes *Cultural Patterns and Ethnic Mentality* (1993), *Mobility and Social Structure* (1994), *Change of Cultural Patterns and Development of Serbia* (1995), whose findings are presented in books of the same titles.

Institute for Pedagogical Research

Established in 1961. Employs 30 full-time staff. State-owned. The main objective of the Institute is to study upbringing and education. Regular research activities include studies on socialization processes and the development of morals, especially since the 1980s. Research is focused on children and adolescents. The results of partial research are presented in total in the books *A Moral Personality* (1989), *Psychological Bases of Philanthropy* (1990), *Children, Media and Violence* (1998), etc.

Institute for Psychology

Established in 1962 as the institute of the Faculty of Philosophy. Employs three full-time staff, but a large number of professors at the Psychology Department of the Faculty as well as collaborators from other institutes and doctoral and master students are involved in its research projects. State-owned. During the 1990s the Institute's researchers mainly used the empirical findings of other institutions as a basis for secondary analysis in the field of social psychology. In the period prior to the 1990s they implemented a number of empirical research projects (on self-management, values and national identity). The Institute conducted a survey on the students' protests in 1992 and the findings were publicized in the book. The transformation of values was elaborated in 1995 in the article *Social changes and changes of values*.

Institute for Political Studies

Established in 1968 as the Institute of the Faculty of Political Science. Employs 37 full-time staff. State-owned. Field work network: 70 members. Up until 1989 the Institute conducted nine public opinion surveys in Serbia and between 1989 and 2001 almost 80. Probability samples and quota samples were used for 1200 to 3500 respondents. Data collection techniques: personal interviews, polls and focus groups. Clients: government (ministries), media, political parties, NGOs, including international agencies and media. The results of 30 surveys conducted between 1992 and 2000 are accessible in row form on computer disks. There is a permanent or temporary time- and content-related embargo on the publication of research results. The Institute is interested in participating in the establishment of the national database.

Institute for Sociological Research

Established in 1971 as the institute of the Faculty of Philosophy. One full-time employee. Research projects are carried out by professors at the Sociology Department of the Faculty. State-owned. Field work network: 15 members. The Institute is oriented primarily to theoretical work and research on social structures. From 1991 to 2001 the Institute conducted 11 surveys. Probability samples and quota samples were used for 1100 respondents for Yugoslavia, 800 for Serbia and 500 for Voivodina. Data collection techniques: personal interviews, polls and group interviews. Clients: government (ministries) and NGOs. The results of all the above-mentioned surveys conducted between 1991 and 2001 are accessible in row form on computer disks. There is no embargo on the publication of research results. The Institute is interested in participating in the establishment of the national database.

Institute for Philosophy and Social Theory

Established in 1981 as the Center for Philosophy and Social Theory in the Institute of Social Sciences, it has operated as a separate institute since 1992. Employs 30 full-time staff. State-owned. The main orientation of this Institute is theoretical. The Institute rarely conducts empirical research on its own, but its researchers regularly use empirical data for secondary analysis. In 1993 the Institute conducted an empirical research project entitled "Social Character and Social Change in the Light of Ethnic Conflicts" (the book of the same title was published in 1995), while in 2001 it is working on the project Politics and Everyday Life. Research is financed by NGOs and international foundations.

Market and opinion research agencies

During the 1990s a large number of market agencies conducting public opinion research were established. Apart from the five agencies mentioned above, the following agencies are actively involved in research: Medijum, Partner, Marten Bord and Milenijum (Belgrade) and Damar (Podgorica). Three NGOs are also engaged in empirical research – Center for Policy Studies, Center for Liberal Democratic Studies (both from Belgrade) and CEDEM from Podgorica. The oldest research organization engaged in media research and occasional public opinion research is the Center for Program and Audience Research of the Serbian Radio and Television Broadcasting Corporation⁹. Except for the Center for Program and Audience Research, all other organizations dealing with public opinion research operate on the market. The best position in this respect is enjoyed by the agencies which are members of large international business networks and make large profits with research projects on markets for goods and services (Strategic Marketing, Medijum). The other organizations, including academic institutes, obtain funds from domestic clients (political parties, state bodies, media) or from international clients (state agencies, media, institutes, foundations). As a rule, the clients do not allow research findings to be published or only allow it to a limited extent.

Center for Program and Audience Research of the Serbian Radio and Television Broadcasting Corporation

Established in 1952 in Belgrade; the departments in Novi Sad and Pristina were established in 1974 and 1981 respectively. State-owned. Employs 11 full-time staff in Belgrade and 10 in Novi Sad. Field work network: 150 members. Engaged in political public opinion research since the beginning of the 1960s. Clients: government, political parties. The Center conducted 30 public opinion surveys up to the end of the 1980s and 12 surveys between 1989 and 2001. In this later period it conducted approximately 80 surveys on media use. Standardized samples are probability samples of 1200-3600 for Serbia and 300-1800 for Voivodina. Data collection techniques: personal interviews, telephone interviews. The results of all surveys conducted between 1989 and 2001 are accessible in row form on computer disks. The Center regularly publishes findings from political public opinion surveys. It is very interested in participating in the establishment of the national database. It has actually planned to establish its own database, but this has not been implemented due to financial problems.

Mark-plan

A private agency, established in 1989. Employs 14 full-time staff. Field work network: 40 members. Engaged in political public opinion research since 1993. To date Mark-plan has conducted 30 surveys of this kind, using probability samples of 1800 respondents for Yugoslavia, 1500 for Serbia and 500 for Voivodina. Data collection techniques: personal interview The results of 28 surveys are accessible in row form on computer disks. Publishes findings of political public opinion surveys quarterly. The agency is interested in participating in the establishment of the national database.

Argument

A private agency, established in 1990. Since its foundation Argument has conducted public opinion surveys for clients at home and abroad (organizations, government institutions, agencies, media, NGOs). Employs 10 full-time staff. Field work network: 320 members. To date Argument has conducted 50 political public opinion surveys, using probability samples of 1200-1600 respondents for Yugoslavia and 1000-1600 for Serbia. Data collection techniques: personal interviews, in-depth interviews and telephone polls. The results of 42 surveys are accessible in row form on computer disks. The agency is interested in participating in the establishment of the national database.

Scan

A private agency, established in 1990. Scan has been conducting public opinion surveys since 1990 for clients at home and abroad (organizations, state institutions, agencies, media, NGOs). Employs 14 full-time staff. Field work network: 263 members. To date it has conducted 31 surveys of political public opinion, using probability samples of 2200 respondents for Yugoslavia, 1800 for Serbia and 1200-1500 for Voivodina. Data collection techniques: personal interviews. The results of the 31 surveys are accessible in row form on computer disks. Research findings are published in the media. The agency is interested in participating in the establishment of the national database.

Strategic Marketing

A private enterprise, established in 1996. It has been conducting political public opinion surveys since 1997 for domestic organizations, political parties and media, as well as for international state institutions, organizations and agencies. Employs 36 full-time staff. Field work network: 986 members. To date this company has conducted more than 50 surveys of political public opinion, using probability samples of at least 1600 respondents for Yugoslavia, 1500 for Serbia and 1200 for Voivodina. Data collection techniques: personal interviews. The results of all surveys are inaccessible in row form.

At present the company is constructing a database which will include 20 surveys carried out between 1999 and 2001. There is a permanent or temporary time- and content-related embargo on the publication of research results. The company is interested in participating in the establishment of the national database.

Center for Policy Studies

A private NGO, established in 1998, it has been conducting political public opinion surveys since 1999 for domestic political parties, as well as domestic and international organizations, institutions, foundations, NGOs, agencies. Employs 6 full-time staff. Field work network: 60 members. To date the Center has conducted more than 11 surveys of political public opinion, using probability and quota samples of 2000 respondents for Yugoslavia, 1700 for Serbia and 720 for Voivodina. Data collection techniques: personal interviews. The Center for Policy Studies is interested in participating in the establishment of the national database.

Faktor Plus

A private agency, established in 2000. Employs 9 full-time staff. Field work network: 50 members. It has been conducting political public opinion surveys since it was established. To date Faktor Plus has conducted 21 surveys of this kind for political parties and media, using probability samples of 2500 respondents for Yugoslavia, 2000 for Serbia and 800 for Voivodina. Data collection techniques: polls, personal interviews. The results of all surveys are accessible in row form on computer disks. There is a permanent or temporary time- and content-related embargo on the publication of research results. The agency is interested in participating in the establishment of the national database.

Statistical offices

During the past few years bureaus of statistics – federal, republican, provincial, city – have regularly collected, analyzed and published (in periodical specialized publications) data on the basic indicators of development in the fields of industry, manufacturing, services and consumption, as well as data on socio-political communities and organizations, population, culture, arts, etc. The last population census was conducted in 1991, but it was boycotted by ethnic Albanians. The census which was scheduled to take place in 2001 was postponed and will now be conducted in 2002. In view of the massive population migrations during the 1990s, the results of the 1991 census are outdated, while forecasts of population trends are not reliable enough. Statistical bureaus publish their analyses in regular publications. There is no direct access to the database from the population census, but it is possible to commission data processing from the

bureaus. The federal and the republican statistical bureaus process and present data on the results of federal and republican elections on the basis of reports by the federal and republican election committees. However the Federal Statistical Bureau participated in forging the results of the Yugoslavian presidential elections in September 2000.

3. Regulations concerning access the data

Since practically no scientific funds have been available for empirical research in Yugoslavia during the last ten years, this kind of research has been financed by clients at home and abroad. This means that they define access to research results. A majority of contracts with clients contain an article which defines the client as the owner of research results. Usually, the contracts only allow publication and/or use of results if this is authorized by the client. Political parties as clients are of course willing to – and encourage – publication of the results which they believe are a positive reflection of themselves. The same applies to domestic government institutions (Cabinet, ministries, etc) and media. Government agencies and public opinion and marketing organizations from abroad normally place a permanent and complete embargo on research results. Nearly every domestic and international NGO and foundation allows the general public an insight into the results of research they finance; they also encourage the publication of these results in the media, journals and books. Although findings from this research are not considered the property of the client, it is still desirable to obtain the agreement of the client and the institution which carried it out in order to gain direct access to data files.

4. Funding situation of empirical social research

As already mentioned in the previous part, the financial situation of empirical social research is very unfavorable. Research organizations are dependent on their clients; the clients have their own, usually very pragmatic aims, and as a rule are not interested in systematic research on crucial social phenomena and problems. The present situation is worse than it was at the beginning of the past decade. The change of regime did not produce any improvement in the financial position of academic research institutions (university and non-university-based institutes). Positive changes in this area can be expected after the country overcomes its economic crisis. These changes will only take place if the economy is stimulated and a larger proportion of gross domestic product is allocated to scientific activities. After the change of the regime in Yugoslavia, some very powerful international political and economic actors, for example the European Union, the World Bank, foundations, etc., have expressed an interest in financing large-scale and long-term research projects aimed at the creation of an environment for successful economic and social reforms. However, this interest is still at the idea stage rather than any form of realization.

5. Assessment of the potential for establishing a national data archive and views on further development

Nearly every scientific research organization and private public opinion and marketing organization is interested in establishing a national data archive of empirical social research. However, the prospects for the implementation of their expressed interest cannot be regarded as favorable. Firstly, a number of scientific research organizations have nothing to offer the potentially established archive, because they have not been empirically active in the last ten years. Secondly, the scientific research organization and private agencies, which conducted hundreds of empirical projects in the last decade, face two problems: the first problem is the embargo imposed by clients, and the second distrust and competition between these organizations. Thirdly, endeavors of this kind require a solid financial basis, which does not exist. Fourthly, archives of individual organizations and agencies are rather disorganized.

6. Results, potential and prospects for developing a data archive of empirical research in the field of social sciences

Results

In the case of Yugoslavia, the achievements attained to date regarding the development of empirical research archives in the field of social sciences can undoubtedly be regarded as very poor. The only exception is the database of the Center for Political Studies and Public Opinion Research (CPIJM): Database CPIJM Research Data (which has been mentioned several times). However, it should be clearly stated that the level of interest shown by potential users (besides the members of the Center for Political Studies and Public Opinion Research) has been rather low.¹⁰

Potential

A good starting point for potential can undoubtedly be found initially in monographs which were made by the scientific institutes in 2001 for the Ministry of Science and Technology. These monographs contain basic data on the institutes, names and descriptions of all the projects implemented between their establishment and 2000, and references to relevant publications. Secondly, all scientific institutes publish jubilee publications on the occasion of their anniversaries, which contain data on the projects carried out. However, it should be taken into account that the above-mentioned sources only provide basic information on empirical research projects – title, time period, methods and techniques applied, presentation of selected processed data and interpretations of findings.

The private agencies which conducted a large number of empirical surveys of public opinion and media in the last decade have said that they are willing to support the establishment of a national data archive on public opinion and media research. However, this common willingness concerns very different aspects: some organizations are only prepared to offer the archive data on the research projects (title, time period, sample type, data collecting techniques) some organizations could offer brief descriptions of the content of research; others could offer questionnaires as well (variables); some are willing to offer distributions of frequencies (marginals); while some organizations could offer complete data files on their research, if it is not under a client embargo. Some agencies are willing to participate with as much data as possible, but have lost some of their own archives. Except for the Center for Political Studies and Public Opinion Research of the Institute of Social Sciences, no other scientific organization in Yugoslavia nor any public opinion or marketing agency have a complete database of their research. Apart from Strategic Marketing, none of them plan to establish a database. This shows that there is still a long way to go from the existing interest and willingness to the actual establishment of a data archive on social science empirical research, which will act as a source of systematic and centralized data.

Prospects

In order to create the National Database of empirical research in the field of social sciences, the following measures have been taken:

1. Preparation of a list of institutions conducting this type of research;
2. Formulation of a questionnaire for collecting data on these institutions and collecting data on the 14 institutions (seven academic institutes and seven other institutions), which are presented in this paper;
3. Conclusion of an agreement among representatives of seven academic institutes in order to establish a consortium for creating the national database;
4. Informing other research institutions – both those who have provided the data required by the above-mentioned questionnaire and those who have not – about the establishment of a consortium and inviting them to join;
5. Conclusion of an agreement among representatives of seven academic institutes to use the existing database of the Center for Political Studies and Public Opinion Research of the Institute for Social Sciences as a platform for creating the national database;
6. Acceptance of the outline of the project for creating the National Database;
7. Conclusion of an agreement among representatives of seven academic institutes that the consortium will apply to UNESCO (UNESCO Participation Programme) for finance which is needed to establish the National Database;

8. Conclusion of an agreement among representatives of seven academic institutes to prepare available data files on their own research surveys (with other necessary material – questionnaires, codebooks, etc.) and hand them over to the author of the Center's database immediately after obtaining finance for the establishment of the National Database.

7. Establishment of the National Archive for Empirical Social Research (National Database)

A large number of empirical research projects in the field of social sciences have been conducted in Yugoslavia, especially during the last ten years. The results of the majority of projects are preserved in electronic form (on floppy disks and/or hard disks). They provide an enormous body of data for secondary analysis, interest in which is expressed both by the domestic and international community, i.e. by domestic and international education institutions, political organizations, government institutions, NGO sector, media, etc..

The use of the available data is quite low. This is due to several reasons ranging from the lack of financial resources and a poor level of information and monopolization of the data through to a number of obstacles resulting from different approaches in surveys, operationalization of research problems, and construction of instruments.

The goals of this project are to solve existing problems and eliminate current obstacles in order to facilitate maximum accessibility to and easy exchange of the social empirical research data, primarily for social science researchers but also for other interested users both in Yugoslavia and abroad. These goals would be accomplished by the establishment of a National Database.

Project plan

The initial stage of the project will include seven academic research institutes which are active in empirical research in the field of social sciences. These institutes are:

- Institute of Social Sciences, University of Belgrade;
- Institute for Criminological and Sociological Research;
- Institute for Pedagogical Research;
- Institute for Psychology of the Faculty of Philosophy, University of Belgrade;
- Institute for Sociology of the Faculty of Philosophy, University of Belgrade;
- Institute for Political Studies;
- Institute for Philosophy and Social Theory, University of Belgrade.

Representatives of these institutes will form a consortium for creating the national empirical research database and apply to UNESCO for funding for this project. The Consortium will be an open group with membership open to all other interested research organizations. The following organizations have expressed an interest in joining the consortium:

- Center for Program and Audience Research of the Serbian Radio and Television Broadcasting Corporation;
- Mark-plan;
- Argument;
- Scan;
- Strategic Marketing;
- Center for Policy Studies;
- Faktor Plus.

Before applying for finance to establish the Database, it is necessary that the representatives of the institutes agree on basic elements relating to the establishment, maintenance and use of the Database.

It is planned that the platform for establishing the Database will be the existing database of the Center for Political Studies and Public Opinion Research (Database CPIJM Research Data). The creation of the Database CPIJM Research Data started in September 1998. At present it includes data from 87 surveys with over 13,800 questions and more than 112,000 alternatives/categories. It encompasses all research surveys conducted by the Center between 1988 and 2001. The user interface and all entries in the Database are in English. The Database CPIJM Research Data currently requires about 190 MB of space on a hard disk. The author of the Database is S. Fajgelj. A description of the Database is provided below, while the basic elements for its completion and reconstruction, and for creating the National Database are described on page 131.

Database of the Center for Political Studies and Public Opinion Research

Purposes of the Database CPIJM Research Data

1. Assistance to the Center's researchers in their research work;
2. *Ad hoc* queries, insights into trends, comparison with earlier data, etc;
3. Presentation of the main findings to the general public on the Internet: <http://www.cpijm.org.yu>

4. Provision of access to the data from the Center's research to the academic community (within the framework of contractual obligations towards clients, data owners, authors, etc.).

Main entities in the Database CPIJM Research Data

1. Research survey
 - a. Name of the survey;
 - b. Time period of the field work;
 - c. Description, client, sample size.
2. Questionnaire questions
 - a. Text of questions;
 - b. Key words, number of alternatives/categories.
3. Responses (alternatives/categories)
 - a. Text of alternatives;
 - b. Key words.
4. Samples of respondents
5. Different codebooks and maintenance data

Functions of the Database CPIJM Research Data

1. **Data entry, updating and deletion.**
2. **Search for text and key words:** *Search for questions; Search for alternatives (categories).*
3. **Data analysis:** Frequency distribution; cross-tabulation (contingency tables) with up to three variables in rows, all percentages, complete labeling, etc.; longitudinal tables (trends); with free selection and combination of variables and surveys. All data analysis procedures have a built-in option for:
 - Recoding (temporary or permanent);
 - Charting (with free selection of charting parameters, preview, printing, etc.);
 - Controlled printing (with proper segmentation of large tables);
 - Copying of tables to WordPerfect, Microsoft Word or other programs;
 - Manipulation, including and excluding missing values.

4. **Printed report on the database contents** (list of surveys and a complete codebook for a single survey).
5. **Maintenance and administration of the database;** maintenance of codebooks, users, passwords, etc.

Data protection against misuse and accidental damage

1. User names, authorizations and passwords;
2. Profile in a Windows registry;
3. Built-in program control for filtering operations and data access with regard to a user name;
4. Special attribute called “embargo” which controls the visibility of surveys and variables depending on a user name.

The Database is written in Microsoft Access. It comprises three separate databases (sub-databases): Main, Working, and Data.

Main database

The Main Database is a replicated database (according to Microsoft Access technology), with user control of permitted operations in replicas. This database contains all tables (except data tables), queries, forms, reports, macros and program modules. The main database contains:

- 8 tables with 73 fields and 31 access keys;
- 21 queries;
- 38 forms;
- 16 reports;
- 6 macros;
- 399 program modules (268 subroutines and 131 functions).

Working database

This database contains working and temporary maintenance data.

Database of data tables

This database contains all data tables and procedures for data import and conversion. Permissible import formats are dBase, Excel, Lotus, etc. Access to this database is only granted to privileged users and is read only to all other users.

The Database is installed by the CPIJM Setup.

Completion and reconstruction of the Database CPIJM Research Data, and creation of the National Database

Creation of the National Database requires:

1. The existing data in the Database CPIJM Research Data are not complete and some additional work is required in textual labeling. In order to complete the Database, it is necessary to:
 - a) translate all texts from Serbian into English and
 - b) enter survey texts, variables, categories and key words (this is vitally important for the availability and accessibility of data).
2. Reconstruction (adaptation, extension) of the existing Database CPIJM Research Data should include:
 - a) optimization of data storage;
 - b) extension and development of the data import procedure; and
 - c) extension and development of the data export procedure.
3. Data availability on the Internet requires the creation and installation of the World Wide Web site with the research data. In the first stage the data would only be available in aggregate form as frequencies/counts. Securing data accessibility includes: data processing, creating frequency distributions; their formatting and creating the website with frequencies and corresponding interface for searches. In the second stage the National Database could be installed on the Internet with a corresponding interface enabling every visitor to search for data, calculate frequencies or create contingency tables (cross-tabulation).
4. Operation of the National Database includes meeting maintenance and utilization conditions which in turn require the following operations: import of new survey data; translation of texts from Serbian into English; entry of survey texts, variables, categories and key words; data search, retrieval and processing according to users' needs; and maintenance and updating of the Web presentation.

In order to create and operate the National Database in the way described above, it is necessary to initiate a project for the Database (system analysis and design) and provide corresponding personnel, hardware and software.

Appendix: Description of surveys conducted since 1990 (selection)

This selection contains 26 surveys. The selection criteria were as follows: potentials of a survey regarding synchronic and diachronic comparability (trend variables), importance and diversity of survey topics within the framework of empirical social research development in Yugoslavia.

Yugoslav public opinion towards the Federal government and the reform program: Conducted in 1990. Probability model sample of 4232 respondents. *Contents:* demographics, image of the Federal government, knowledge of the reform program, reactions to the reform program, attitudes towards changes in the political system, attitudes toward the introduction of a multi-party system, interethnic relations, ethnic distance, attitudes toward foreign affairs, value priorities, group affiliations, religiousness, ecology.

From election rites to free elections: Conducted in 1990, three waves. Quota sample of 1400 respondents in each wave. *Contents:* demographics, participation in elections, party support, determination of election behavior (image of political parties and candidates, issues, media), election forecasts.

Public opinion on Serbia in 1991: Conducted in 1991. Quota sample of 1489 respondents. *Contents:* demographics, participation in elections, party support, determination of election behavior, participation in and reaction to mass political protests.

Yugoslav public opinion in 1992: Conducted in 1992. Quota sample of 1932 respondents. *Contents:* demographics, popularity of political parties and leaders, attitudes toward countries and ethnic groups, reactions to the sanctions imposed by the international community, use of media.

Public opinion on Serbia in 1992: Conducted in 1992, three waves. Average quota sample of 1073 respondents. *Contents:* demographics, popularity of political parties and leaders, reactions to the sanctions imposed by the international community, participation in elections, party support, determination of election behavior (image of parties and candidates and issues), use of media election forecasts.

Public opinion on Serbia in 1993: Conducted in 1993. Quota sample of 1510 respondents. *Contents:* demographics, party support, popularity of political leaders, economic issues, attitudes towards problems in Kosovo and Metohia, trust in institutions, relations between Serbia and Montenegro, attitudes toward countries and ethnic groups, reactions to the armed conflicts in Croatia and Bosnia and Herzegovina, use of media.

Change in everyday life: Serbia at the beginning of the 1990s: Conducted in 1994 and 1999. Probability sample of 1500 and 1200 respondents. *Contents:* demographics, reactions to social changes in employment and family life.

Yugoslav public opinion in 1995: Conducted in 1995. Quota sample of 2000 respondents. *Contents:* demographics, party support, popularity of political leaders, economic issues, trust in institutions, attitudes towards problems in Kosovo and Metohia, trust in institutions, relations between Serbia and Montenegro, attitudes towards countries and ethnic groups, attitudes towards foreign policy, use of media.

World Values Survey: Conducted in 1996 based on a Yugoslav probability sample of 1520 respondents and in 2001 on the basis of Serbia and Montenegrin probability samples of 1200 and 1060 respondents respectively. *Contents:* value indicators standardized within the World Values Survey.

Yugoslav public opinion towards the legitimacy of the third Yugoslavia: Conducted in 1996. Quota sample of 1904 respondents. *Contents:* attitudes toward the former social system, trust in institutions, attitudes towards the media, value orientations, attitudes towards democracy, group identification.

Public opinion on Serbia in 1997: Conducted in 1997, three waves. Quota sample of 1560 respondents per wave. *Contents:* demographics, party support, popularity of political leaders, economic issues, attitudes towards problems in Kosovo and Metohia, trust in institutions, participation in and attitudes towards mass protests, attitudes towards democracy, relations between Serbia and Montenegro, use of media.

AIDS and Youth: Conducted in 1997. Quota sample of 1000 respondents. *Contents:* attitudes of young people towards gender relations, knowledge of and attitudes towards AIDS.

Public opinion on Montenegro in 1997: Conducted in 1997. Quota sample of 1530 respondents. *Contents:* demographics, economic issues, party support, popularity of political leaders, reactions to the conflict within the ruling party, crime and corruption, relations between Serbia and Montenegro, use of media, presidential election forecasting.

Yugoslav public opinion in 1998: Conducted in 1998. Quota sample of 2840 respondents. *Contents:* demographics, party support, popularity of political leaders, use of media, trust in media.

Public opinion on Montenegro in 1998: Conducted in 1998, three surveys. Average quota sample of 1560 respondents. *Contents:* demographics, economic issues, party support, popularity of political leaders, corruption, relations between Serbia and Montenegro, attitudes towards problems in Kosovo and Metohia, use of media.

Yugoslav public opinion in 1999: Conducted in 1999. Quota sample of 2840 respondents. *Contents:* demographics, economic issues, party support, popularity of political leaders, relations between Serbia and Montenegro, attitudes towards problems in Kosovo and Metohia, reactions to NATO bombing, use of media, computers, e-mail and the Internet.

Public opinion in Serbia in 1999: Conducted in 1999. Quota sample of 1600 respondents. *Contents:* demographics, party support, popularity of political leaders, economic issues, attitudes toward opposition parties vs. parties in power, trust in media.

Public opinion on Montenegro in 1999: Conducted in 1999. Quota sample of 1100 respondents. *Contents:* demographics, economic issues, party support, popularity of political leaders, trust in institutions, crime and corruption, reactions to the sanctions imposed by the international community, relations between Serbia and Montenegro, attitudes towards problems in Kosovo and Metohia, attitudes toward countries and ethnic groups, use of and trust in the media.

Public opinion on Serbia in 2000: Conducted in 2000. Quota sample of 1578 respondents. *Contents:* demographics, party support, popularity of political leaders, economic issues, attitudes towards problems in Kosovo and Metohia, trust in institutions, relations between Serbia and Montenegro, attitudes toward countries and ethnic groups, foreign policy.

Public opinion on Montenegro in 2000: Conducted in 2000. Quota sample of 1540 respondents. *Contents:* demographics, economic issues, party support, popularity of political leaders, trust in institutions, crime and corruption, reactions to the sanctions imposed by the international community, relations between Serbia and Montenegro, attitudes towards problems in Kosovo and Metohia, attitudes toward countries and ethnic groups, use of and trust in media.

Early warning system: Conducted in 2000 and 2001, seven surveys. Average quota sample of 1,617 respondents. *Contents:* economic indicators (income, expenditure, employment and the labor market, gray economy), crime, corruption and social stability, interethnic relations, attitudes towards the old and new government, trust in institutions, party support.

Yugoslav public opinion in 2001/2001: Conducted in 2001. Quota sample of 3,116 respondents. *Contents:* demographics, party support, popularity of political leaders, economic issues, trust in institutions, use of media, computer, e-mail and the Internet.

Yugoslav public opinion in 2001/2002: Conducted in 2001. Quota sample of 2,056 respondents. *Contents:* demographics, party support, popularity of political leaders, economic issues, trust in institutions, relations between Serbia and Montenegro, attitudes towards problems in Kosovo and Metohia, use of media.

Public opinion on Serbia in 2001: Conducted in 2001. Quota sample of 1,456 respondents. *Contents:* demographics, party support, popularity of political leaders, economic issues, attitudes towards problems in Kosovo and Metohia, trust in institutions, relations between Serbia and Montenegro, foreign policy, terrorism.

Public opinion on Montenegro in 2001: Conducted in 2001. Quota sample of 1,100 respondents. *Contents:* demographics, economic issues, party support, popularity of political leaders, trust in institutions, crime and corruption, reactions to the sanctions imposed by the international community, relations between Serbia and Montenegro, attitudes towards problems in Kosovo and Metohia, attitudes towards countries and ethnic groups, use of and trust in the media.

Business associations of private enterprises in Serbia: Conducted in 2001. Stratified sample of the owners/managers of 500 private firms. *Contents:* typology of business associations, membership of business associations, perceptions of the role of business associations, expectations of business associations.

Notes:

- 1 This part of the text concerns the situation in the former “second” Yugoslavia, with the emphasis on the situation in Serbia and Montenegro.
- 2 The journal *Sociology*, launched in 1959; *Sociological Review*, launched in 1961; *Psychology*, launched in 1967.
- 3 The Yugoslav Association for Sociology was established in 1954, followed by corresponding associations in individual republics: Serbia – 1954, Croatia – 1958, Macedonia – 1962, Slovenia – 1965, Montenegro – 1968, Bosnia and Herzegovina – 1970.
- 4 Faculties of sociology were set up in 1959 in Belgrade, in 1960 in Ljubljana, in 1963 in Zagreb, in 1965 in Sarajevo, in 1971 in Nis, in 1973 in Pristina, in 1974 in Zadar, in 1975 in Skopje, in 1976 in Novi Sad and in 1977 in Niksic. A faculty of psychology was established in Belgrade in 1959, followed by faculties in Zagreb and Ljubljana. A faculty of political science was set up in Belgrade in 1963 and later in Zagreb, Ljubljana and Sarajevo.
- 5 Regular public opinion polls and election research were carried out from the beginning of the 1960s. The characteristics of the research work are described on page 111.
- 6 This part of the text only concerns Serbia and Montenegro, i.e. the situation in the present, “Third” Yugoslavia.

- 7 There were two other institutes engaged in empirical social research, but both stopped functioning during the 1990s due to financial difficulties. The first is the Institute of Journalism, which was established at the beginning of the 1960s. It published the journal *Journalism*. The Institute carried out various empirical research on media and mass communication. The other is the Institute for Social Policy, which was established at the beginning of the 1970s.
- 8 According to legal regulations, the status of scientific institute is only given to those financed by the Ministry of Science and Technology of the Republic of Serbia. In order to obtain this status, the institutes have to meet a series of requirements ranging from the number of full-time staff and the structure of personnel in terms of their scientific titles through to the quantity and quality of published works of researchers.
- 9 The compilation of data for Medijum, Partner, Marten Board, Milenijum, Damar, the Center for Liberal Democratic Studies and CEDEM is in progress. The chances of finishing this work are poor due to the lack of interest within these institutions.
- 10 Although fees should be charged for extensive use of the Database CPIJM Research Data, domestic scholars have not had to pay anything to date. Low use of the Database CPIJM Research Data can be attributed to insufficient knowledge of potential users regarding access to and handling of computers.

**PART II:
DATA ARCHIVE
PROGRESS REPORTS**

Establishing the Sociological Data Archive in the Czech Republic

*Jindrich Krejci, Sociological Data Archive,
Czech Academy of Sciences*

1. History of social survey research in the Czech Republic

Empirical social research has a long tradition in the Czech Republic. The first empirical surveys were conducted in the 1930s while the first program for a systematic attitudinal survey was created in 1946 at the Czechoslovak Institute for Public Opinion Research. The impact of the communist regime on the further development of the social sciences was, unfortunately, disastrous. In the 1950s sociology was considered a bourgeois pseudo-science and anything reminiscent of sociological research was abolished, although sample surveys were still conducted in the field of socio-economic research as part of the official statistics of the Statistical Office. In the “thaw” years during the 1960s, empirical research underwent intense development, in particular in the second half of the decade. The period of “normalization” after the Soviet occupation of 1968 put a stop to this. Some research activities were placed under the direct control of the communist party (e.g. research program of the former Institute for Public Opinion Research), while others were banned altogether. Nonetheless, socio-economic surveys continued to be conducted, including official statistics and economic opinion polling. There were also several surveys of the family and two large scale stratification surveys (Class and Social Structure in 1978 and 1984).

After the political transformation in 1989 the development of empirical social research also changed substantially. The Czech Republic also started to take part in international research activities. The development of survey research was primarily due to the liberalization of the restrictive environment and an increase in the public’s need for research information. This need continues to grow as a result of the gradual stabilization of Czech democracy, economic growth and the inclusion of the country in European and global structures.

2. Current conditions in Research and Development (R&D)

The transformation of Czech science since 1989 has had its positive aspects, but it also involved a certain amount of chaos and resistance to the necessary changes. The studies “Visions of the Development of the Czech Republic up to the Year 2015” (1) and “Strategy for Higher Education, Science and Research” (2) recap the current situation and attempt to propose ways to improve this situation. Based on these studies, I have summarized the problematic features of Czech R&D in the following manner:

- Long-term under funding of research and development
- Unsuitable institutional arrangements (e.g. separation of research from higher education)
- Generally low levels of efficiency in research
- Considerable qualitative differences among individual research institutions and teams
- Separation of basic and applied research, and the inability to respond to the needs of society
- Scant support for the development of R&D in the private sector
- Inadequate support for R&D in the higher education sector
- Low level of penetration of Czech R&D in the world
- Low salaries of researchers in the government and higher education sectors, and the related brain-drain to the private sector and abroad

Although EU countries face the same problems, the problems are more severe in the Czech Republic. The character of the institutional conditions, which probably lie at the heart of performance problems, is rather specific to the Czech Republic.

The development of some indexes and some events over the past few years (e.g. the increase in investment, the growth in performance indexes, the formulation of priorities in government policy, inclusion in a number of European programs, etc.) are indications of a gradual improvement in the situation. From the perspective of global developments, however, the Czech Republic is continuing to slip from its original position in some areas. Some research performance indexes are still very low (e.g. the Relative Citation Impact Index is below the level of Hungary and Poland and the average of the associated countries)¹. The results of the political transformation and the degree of under funding in higher education are also unsatisfactory (5).

Figure 1: Gross domestic expenditure on R&D (GERD), as a percentage of GDP, in 1999 or latest available year²

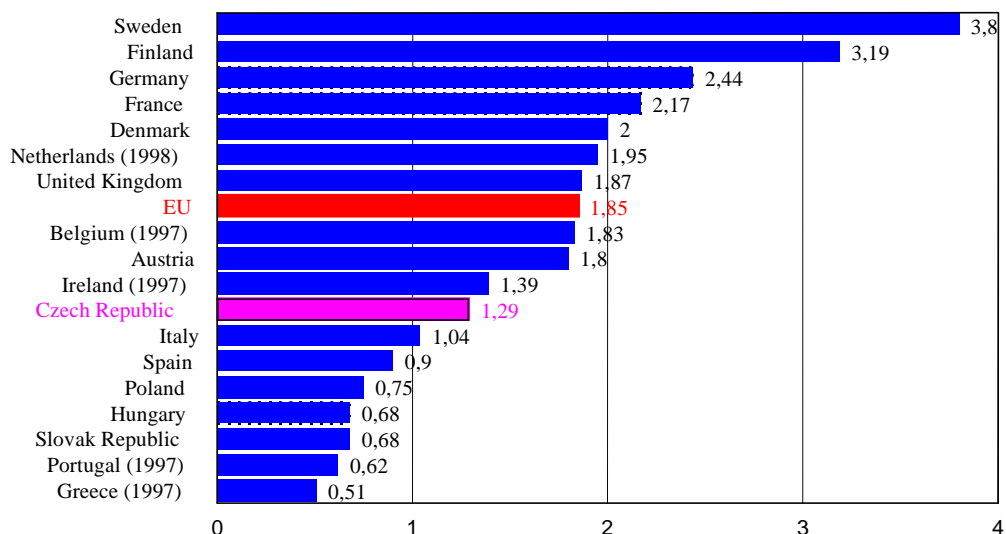
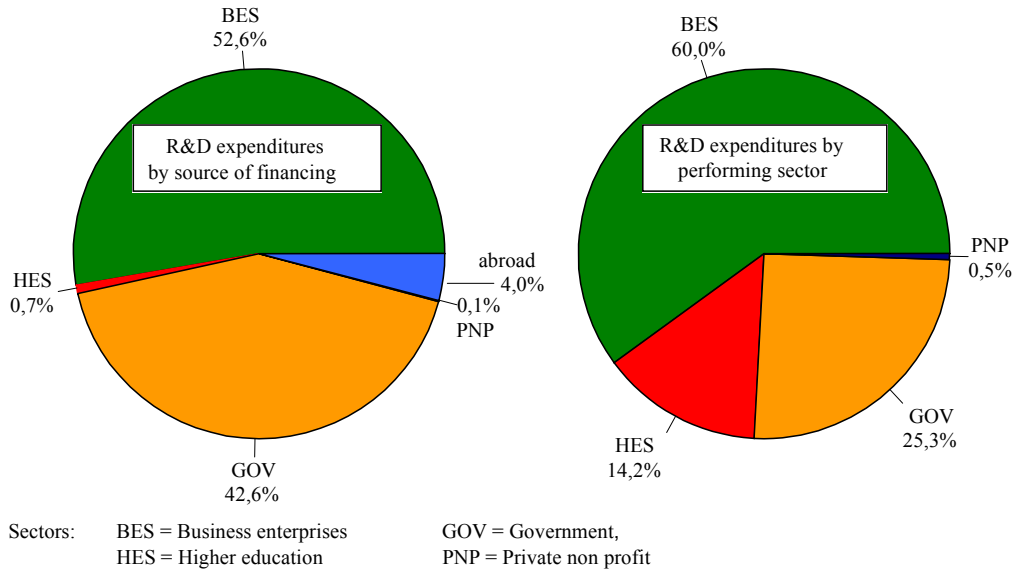


Figure 1 provides a comparison between Czech investments in R&D and those in selected European countries. The relative indexes of financial support in the Czech Republic in 2000 were just below 70% of the average for the 15 members of the EU. There are, however, great differences between individual member countries, and the amount of investment in the Czech Republic surpasses some of them; this is also true of some of the other EU accession candidate countries, namely Hungary, Poland and Slovakia.

Figure 2 describes the structure of resources and the investment allocation according to individual sectors. The percentage of investments in the private sector is lower in comparison with the EU average. Only a very small proportion of investments are effected in the private non-profit-making sector. The share of foreign grants and other resources contributing to the financing of Czech science amounted to 4% in 2000.

The above assessment may also be applied to the social sciences. During the communist regime, this field was more impoverished than natural and technical sciences. A number of fields were suppressed on ideological grounds; some types of research were not needed in the given conditions. Even today, social sciences represent a very small percentage of total research.

Figure 2: Czech intramural expenditure on R&D in 2000 by source and performing sector³



This fact can be gleaned from Table 1 which contains data on investments and the number of employees. Expenditure on social sciences in 2000 amounted to 1.2% of total R&D expenditure; the share of employees in the social sciences is 2%.

Table 1: Structure of intramural R&D expenditure and R&D personnel in 2000⁴

	Intramural expenditure		Personnel in FTE ¹ in thousands	
	in thousands of CZK	in thousands of EUR ²	Employees Total	Researchers
Natural science	6 619 037	185 928	6 926	4 429
Technical science	15 621 031	438 793	11 864	6 202
Medical science	1 835 034	51 546	1 596	909
Agricultural Science	1 242 630	34 905	1 785	929
Humanities	855 244	24 024	1 552	1 072
Social sciences	314 270	8 828	475	311
TOTAL	26 487 246	744 024	24 198	13 852

Notes:

1 FTE: Full time equivalent

2 1 EUR = 35.6 CZK (average rate in 2000)

3. Data services in the Czech Republic

With respect to official statistics, data services are provided by the Czech Statistical Office (Český statistický úřad, ČSÚ). (7) The statistics services concentrate in particular on the distribution of research results, but primary data from sample surveys are made available under certain conditions.

In the field of academic research, data services were slow in arriving. Projects for the systematic archiving of data were rare even within individual institutes. Most data remained in the possession of individual research teams. Nevertheless, the idea of archiving data has a long tradition. The need and the technical resources required to store and distribute electronic data files through a data archive first appeared at the end of the 1960s (8). The period of normalization had an effect on this promising development: social research was suppressed and there were also fears that the communist regime might abuse the archived data. However, at the end of the 1970s, a thematic archive was established which focused on social stratification surveys conducted between 1978 and 1984 (9). In 1990 this archive was destroyed. Some of the materials were preserved by users of the archive and are now stored in the Sociological Data Archive. After 1989 the idea of a national data archive again became popular and several projects were considered in this respect. In September 1998 the Sociological Data Archive (Sociologický datový archiv, SDA) was opened at the Institute of Sociology, Academy of Sciences of the Czech Republic. Two qualitative data archives have recently been established. The Czech Qualitative Data and Documents Archive (Český archiv kvalitativních dat a dokumentů) at Masaryk University in Brno was created in 1999 (10, 11). The MEDARD Soft Data Digital Archive (Digitální archiv měkkých dat MEDARD) was founded in 2000 and is part of the Virtual Institute in Prague (Virtuální institut) (12, 13).

4. Sociological Data Archive (SDA) and Czech specifics

The main objective of the SDA is to make Czech sociological data publicly available for academic, educational and other non-commercial purposes. There are three main areas of activities of the Archive:

- Acquisition, archiving and provision of data files
- Promotion of data dissemination and secondary analyses
- Support for special research projects

The SDA collects computerized data files from quantitative sociological surveys. Data holdings include public domain data collected by the Institute of Sociology and other Czech organizations conducting state-financed sociological research, as well as data from Czech public opinion polls and international surveys with Czech participants. An electronic data catalogue and access to services are provided via the Internet (<http://archiv.soc.cas.cz>).

The following specifics of the Czech environment are crucial for the development of data services:

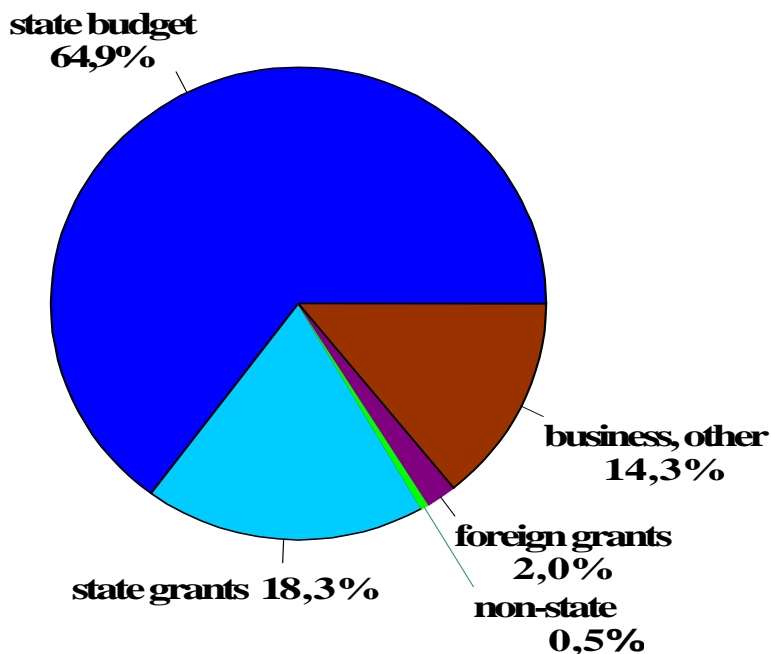
- The tradition of using data services is underdeveloped,
- In some fields there is basically no accompanying social research infrastructure (information services, methodological centers).

The problem of how to increase the use of secondary data analysis not only involves the data services being offered, but also demand. Researchers are not really aware of the existing possibilities. Data services, whether domestic or international, are used less than they should be. Few projects include secondary data analysis as an important element in research strategy. A comparison of investments in surveys and the number of published analyses therefore often reveals evidence of inefficiency. If, for example, we browse through the archived datasets, we discover that in some cases there are only two or three publications related to a particular data file and some parts of several surveys have not been processed at all. The SDA therefore pays close attention to the dissemination of information on data services and to support for secondary data analysis. The information strategy of the SDA includes publishing in periodicals, its own information materials, participation in teaching programs at universities (e.g. a course in Social Data Archives at the Faculty of Social Sciences of Charles University) and the organization of public presentations. The SDA also publishes a quarterly information bulletin titled *SDA Info* (in Czech). Since it was established, the SDA has often been asked about things which are not directly concerned with the provision of data. Online services have therefore been expanded to include the following:

1. A directory of links to sources of social data, Czech and foreign centers of social research and general information on the Czech Republic, and
2. Online access to analytical publications of the Institute of Sociology.

The Archive helps to create support for the organization of some research projects. This involves, in particular, Czech surveys in the International Social Survey Program (ISSP) and the recently launched European Social Survey (ESS). It has also contributed to a lesser extent to the Czech part of other projects, e.g. the International Social Justice Project (ISJP), the Second International Adult Literacy Survey (SIALS) and the European Value Study (EVS).

Figure 3: Funding of the Czech Academy of Sciences in 2000 according to source



Institutional settings of SDA

The SDA was founded as part of a large-scale project entitled Social Trends (1996-1998), the objective of which was to launch a regular social information service concerning Czech society (14). The project involved the implementation of regular surveys (participation in ISSP, longitudinal survey Economic Expectations and Attitudes), the foundation of the data archive, a series of analytical publications, the publication of a social report and the creation of a post-graduate educational program. A team comprising four institutions took part in this project: the Institute of Sociology, the School of Social Studies at Masaryk University in Brno, the School of Economics in Prague and the Center for Educational Policy in Prague. The Grant Agency of the Czech Republic (GAËR) provided financial support. Unfortunately, it was not possible to ensure the continuation of all segments in a new project of a similar extent. Some activities, however, continue as independent projects. The Data Archive was founded at the Institute of Sociology (SoÚ), which – after the termination of the Social Trends – has guaranteed its existence. The SDA has been a department of the Institute of

Sociology since 1999. A project which concentrated on the expansion of the data library and improvement in the data archive services was implemented again in 1999 and 2000 with the financial support of GAÈR. In 2001 the SDA became a member of CESSDA (Council of European Social Science Data Archives).

The SoÚ is an independent non-profit-making research institute working within the Academy of Sciences. It is one of the main centers of empirical sociology in the Czech Republic. The research program includes a number of topics⁵; the SoÚ is a Czech representative in the ISSP and a member of the international organizations ECSR, IPSA, ECPR. It publishes *Sociologický časopis* (Czech Sociological Review) and a number of specialized publications.

The Academy of Sciences of the Czech Republic was established by the state and its activities are largely financed from the state budget (see Figure 3); nevertheless, it is not a service organization for the government.⁽¹⁵⁾ The objective of the Academy is to create an independent environment for basic research. Elected bodies of the Academy approve individual research programs. The Academy now consists of 60 research institutes and 7 service institutions (see Table 2).

Table 2: Structure of the Academy of Sciences of the Czech Republic⁶

Division	Number of institutes	Personnel in FTE ¹	
		Total in %	Researchers in %
Mathematics, physics, informatics	6	18.0	19.0
Applied physics	8	11.0	10.5
Earth sciences	5	7.2	7.4
Chemical sciences	6	14.7	16.3
Biological and medical sciences	10	22.0	20.7
Bio-environmental sciences	6	6.7	6.8
Socio-economic sciences	5	3.0	3.9
History	7	5.6	6.1
Humanities and Philology	7	5.8	8.2
Service organizations	7	6.0	1.1
Academy of Sciences in TOTAL(count)	67	100.0 (6 603.9)	100.0 (3 504.1)

Note:

1 FTE: Full time equivalent

Information on staff, equipment and budget

At present the SDA has at its disposal one office and three employees, most of whose workload is dedicated to the archive. In addition to this, the Archive cooperates with the other teams of the Institute of Sociology and makes use of the Institute's administrative and technical support. The Archive's data library and the Web server are located on a UNIX server (Solaris 8) where 18 GB have been allocated to the Archive. The Archive is connected to a backbone of a large academic network. The team has at its disposal PCs of an appropriate quality and access to presentation equipment (including a data projector). The Archive has access to the academic multi-license of SPSS and has licenses from STATA (including STAT Transfer), Adobe PageMaker, Adobe Acrobat and other standard software.

The budget of the Archive is not fully separated from the budget of the SoÚ. The basic salaries of the staff, office operations, technical equipment and expenses for regular services of the Archive are paid from the Institute's overhead budget. The establishment and development of data services were paid from grant money (see above). Other projects are used to support some of the activities of the Archive. At present, the SDA is participating in the following projects:

- Two Czech projects within the ISSP,
- A Czech project within the ESS (European Social Survey),
- Two data and research quality assessment projects (election studies, Media Project)

Financial and material support for the Archive is good compared with the conditions of Czech sociology, but is still very uneven. The main limits are as follows:

- The budget for the overhead expenses of the Institute of Sociology are limited. Archive development projects must therefore be proposed in such a way so as not to burden the budget with high operating costs.
- The biggest problem involves the personnel and salary limits of the Academy of Sciences. These limits do not permit an increase in the number of permanent employees dedicated to the Archive. The small size of the team reduces flexibility and the ability to cover all the potential projects that could contribute to the development of the Archive. The composition of the team often changes. It is necessary to ensure that sufficient financial compensation is paid from grant projects and the motivation must be increased by offering the SDA staff the opportunity to carry out research.
- Some features of the institutional arrangements of the Academy of Sciences are unsuitable. For example, the accounting system does not correspond to the accounting systems of projects, whether foreign or local, and the quality of the administrative support is also problematic⁷.
- In the Archive team there are no experts in the field of information technologies and the IT Department within the Institute of Sociology is overloaded.

There are plans to negotiate an increase in the size of the budget and the number of Archive staff with the Academy. However, this depends on the resolution of other demands pertaining to institutional arrangements.

Larger projects can be organized even now in cooperation with other teams within the Institute of Sociology or based on external cooperation. The SoÚ currently employs 54 researchers (some of them on a part-time basis). It has its own editing and publishing department. Meetings and conferences can be held at the Academy of Sciences since it has its own conference facilities, including services, equipment and accommodation.

The greatest challenge for the Archive is the transfer to the DDI documentation standard and XML technology. This project will be very demanding on account of the volume of work involved in modification of the current documentation. In addition to obtaining the relevant software and hardware, it will be necessary to ensure additional work capacities.

5. Taking advantage of existing experience

The Data Archive was constructed as part of two Czech projects. The primary objectives were to ensure fast archiving, ensure and make accessible at least the most important Czech surveys, ensure easier access to international survey data, support the teaching of sociology, and maintain data services. As a result of discussions over the last 30 years concerning data services, the purpose of the Archive is now quite clear. The project has therefore received strong support right from the beginning.

The establishment of data services in the era of the Internet, however, cannot be based on principles formulated in the 1960s. The starting point was the study of the arrangement of services provided by existing organizations. The Archive was established in 1998. It was primarily modeled on the ZA services and UK Data with its BIRON catalogue, and partly on TARKI, whose data services have been developed to function in the conditions of a country in the process of transformation. The arrangement of services and the data library, the principles of data provision, storage and cataloguing, and the Internet tools were examined. Personal contacts have been established, especially with the ZA. A one-week visit to the ZA in 1999 established direct links with a well-functioning infrastructure and better knowledge of data service networks. This helped to clarify the priorities and the direction of the future development of the SDA and elaborate some systems of service functionality in more detail. Links to promote data exchanges were also established.

The advantage of a newly established data organization is the possibility of adopting and adapting mechanisms that are already in place. It allows priorities and schemes for service functionality to be set. Services can be developed quickly and efficiently, and many problems can be eliminated in advance. The acquisition of data from international projects stored in existing archives leads to an increase in the size of the data library to include national studies, which are often crucial. Pressure and support from the

international community usually provide the main impetus for the creation of national data services. Support programs for new and less developed archives can help to overcome the lack of local support for the social sciences infrastructure and the shortcomings of the institutional environment.

The SDA has been a member of CESSDA since 2001. In future we can expect that full-scale involvement in the network of international data organizations will be a new qualitative step forward with respect to the range, comfort and efficiency of services. The main benefits of international cooperation are data exchange, the gradual interconnection of data services, joint work in developing IT technologies, possibilities of sharing results achieved in joint projects, standardization and joint policy concerning the further development of services and garnering of support. This will also open up a new channel for cooperation in social research.

6. Comparison of the Academy of Sciences and other structures

The SDA is part of the Institute of Sociology of the Academy of Sciences of the Czech Republic. The following alternatives can also be considered with regard to the creation of an alternative organizational structure:

- Universities,
- A commercial institution,
- Research or infrastructure center established by several institutions.

What are the advantages and disadvantages of running the data archive within each of these structures?

The environment of the Institute of Sociology of the Academy of Sciences has already been described above. It is a large research organization. There, the SDA is directly connected to survey research. Access to materials from many surveys is easier and, return, the SDA has expanded and improved the research infrastructure of the Institute. In addition to this, the SDA takes advantage of the technical support of the Institute and Academy. It is also assumed that institutes of the Academy have better chances to obtain grants than universities. The major proportion of state support for R&D is realized here; moreover, the Academy has its own grant agency. Nevertheless, it is the Academy of Sciences to which the main reservations concerning the institutional arrangement of Czech R&D are directed. First among these is that research is separate from teaching. Consequently, the Archive has fewer contacts with students. This is, however, partially overcome thanks to cooperation with universities. The impact of other structural problems (personnel limits, inflexible administration, etc.) has been described above.

The higher education environment would bring the services of the Archive closer to students and students could participate in data processing for archiving purposes. Compared with the Academy of Sciences, though, access to surveys and data would be limited. Ensuring permanent funding would also be more problematic. Universities now find themselves in financial difficulties and extra-curricular activities are being eliminated or reduced. Some universities are capable of providing relatively high-quality material and technical support, but it would still be necessary to overcome a number of problems concerning the institutional organization.

A private company administering the Data Archive would have to be profit-oriented. The activities of the Archive could, nevertheless, be financed from grants. For the time being, however, I am not aware of any appropriate local resources of grant support that could ensure long-term financing of the Archive. Profits could be generated by creating value added to the materials provided – quality documentation, tools for viewing of materials and analysis. This would lead to improved user comfort, but the increase in costs would also discourage some user groups.

An appropriate environment for data services could be created at a research or infrastructure center established by several institutions. This is a frequent strategy used to overcome the problem of rigid institutional structures. Many support programs have also been designed to specifically finance such an arrangement (support for interdisciplinary cooperation, centers of excellence, etc.). The Social Trends Project was headed in this direction. In such an environment, the Archive could combine the advantages of the support provided by research institutions and universities, and expand its scope to include more disciplines (in the case of Social Trends, sociology, economics and educational research). In addition to general characteristics, however, the development of the Archive depends on existing conditions and the people involved. The management of the Institute of Sociology now concentrate on changing the institutional organization in order to stimulate development and greater cooperation in research activities. The SDA occupies a rather important position in these plans.

Notes:

- 1 Some international comparisons, however, do not take account of research results from the period of Czechoslovakia and thus rate the situation as worse than it actually was.
- 2 Source: OECD, MSTI Database (3).
- 3 Source: Czech Statistical Office.
- 4 Source: Czech Statistical Office.(6)

- 5 Change in the Political System, Demographic Behaviour and Family, Economic Sociology, Gender in Sociology, Problems of Border Regions, Regional and Local Politics, Social Stratification and Transformation of the Social Structure.
- 6 Source: Czech Statistical Office.
- 7 For example, bookkeeping in the Full Cost Model of the 5th Framework Program is basically unrealistic.

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Empirical Research and the Situation of Data Archiving in Estonia

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1. Empirical social research in Estonia

It was at the University of Tartu in the 1960s when it first became possible to conduct empirical social studies in the USSR. At that time contacts with colleagues from the Soviet Union were very important. The institutional breakthrough came with the creation of the Sociological Laboratory at the University of Tartu in 1968. The main fields of research carried out at that time had a decisive influence on the subsequent development of sociology in Estonia.

Social research in Estonia is currently divided between different academic and non-academic institutions. The main fields of research in the Department of Sociology and Social Policy at the University of Tartu (<http://psych.ut.ee/stk/sotsioloogiaen/index.htm>) are the family and welfare, deviant behavior, social stratification and mobility, life paths of generations in contemporary Estonia, and youth and education.

The main sociological research topics in the Department of Journalism and Communication at the University of Tartu (<http://saba.jrnl.ut.ee/jrnl/english/>) are post-communist transition society, media and changes in society, and the role of the educational system and media in integrating non-Estonians into Estonian society.

The main research areas in the Department of Sociology at Tallinn Pedagogical University (http://www.tpu.ee/sotsioloogia_osakond.html) are environmental sociology, pedagogical sociology, sociology of charity, sociology of tourism and sociology of international relations.

The main research fields in the Institute of International and Social Studies at Tallinn Pedagogical University (http://www.iiss.ee/index_en.htm) include cultural dialogue in Estonia in the 1990s, ethnic, regional and global factors, social stratification and mobility in a changing society, life paths in contemporary Estonia, changing values and lifestyles in Estonia in the 1990s, economic and social resources of families, the social dimension of European integration and problems of the nation-state.

The research profile of the Estonian Statistical Office (<http://www.stat.ee/>) includes such fields as education, household budget surveys, population, labor force surveys, social trends, gender, and time use surveys.

Established in 1990, Emor AS (<http://www.emor.ee/eng/>) is the largest full-service marketing research and consulting company in Estonia. Its main areas of research are marketing and media research.

The research profile of the private company Saar-Poll (<http://www.saarpoll.ee/>) includes different opinion surveys (World Values Survey, Eurobarometer, political participation, surveys of trends commissioned by the Estonian Parliament or the Estonian Government).

The most important recurrent studies in the research profile of Market Studies' Ltd. (<http://www.turu-uuringute.ee/>) include the election preferences of the Estonian population, public opinion on national defense.

2. Data archiving in Estonia

The creation of the Social Science Data Archive in Estonia was started by transferring the data stored in the computing centers of Tartu University and Radio Estonia to PC format in order to preserve the data. By 1996 all machine-readable data files from the period between 1975 and 1994 had been transferred to the data bank and more than 100 data files had been converted to SPSS format. The Estonian Social Science Data Archive (ESSDA) started its activities within the framework of a project financed by the Open Estonia Foundation in 1996. We have already discussed our situation in more detail (1). Since 1997 there has been no regular funding, and our work relies mainly on support and social initiatives by the Faculty of Social Sciences and the Department of Sociology of Tartu University. ESSDA cooperates closely with the Academic Union of Estonian Sociologists as well as non-academic institutions which are conducting social research. Up until now ESSDA has archived data from around 250 empirical social studies.

The activities of the Estonian Social Science Data Archive have lately been seriously restricted by the lack of finance. As a result of the rejection of several of applications, our only regular funding body has been the Faculty of Social Sciences of Tartu University, which also pays the salary of our part-time (0.5) data manager. The Faculty has also provided ESSDA with two rooms in the building of the Faculty of Social Sciences free of charge. Despite very limited resources, the Archive has continued compiling new data and organizing existing data. ESSDA has developed ties with the Estonian Statistical Office by communicating statistical data based on foreign inquiries according to terms set by the Statistical Office. The number of users of the Archive has grown. Among them are Estonian as well as foreign social scientists and journalists.

The Internet sites of ESSDA (<http://www.psych.ut.ee/esta/>) have steadily been updated to include new information. Recently, the database on BA and MA theses submitted to the Faculty of Social Sciences was added. Unfortunately, this information is available only in Estonian.

We have started scanning non-electronic material such as questionnaires and transferring them to an electronic format. Two issues of the electronic journal “Estonian Social Science Online” (<http://www.psych.ut.ee/esta/online/>) were launched with the help of ESSDA.

Reciprocal visits and discussions concerning possible joint activities have taken place with representatives of the Finnish Social Science Data Archive.

3. Estonian National Data Archive as part of an university

There are some important reasons for the Archive’s location in Tartu: an initial group for creating a data bank on social sciences was formed by sociologists, psychologists, political scientists and human geographers of Tartu University. In summer 1995 the University of Tartu provided a room for the data bank in the Faculty of Social Sciences. Secondly, the University of Tartu has been a leading center for social science research since the beginning of the first surveys in the 1960s. Thirdly, it is possible only at the university to solve some problems without paid staff. For example, we can sometimes link data bank activities with other tasks in the Faculty of Social Sciences. We can also use datasets from the Archive in teaching. Students can work with real data. After graduating, they are often potential data users in future. And finally, because the University of Tartu is by far the oldest university in Estonia, it has a prestigious name for potential and real partners in the public and private sectors.

However, there are still some disadvantages as regards the location of the Archive in Tartu. First and foremost, we sometimes encounter problems with the data providers from other research centers. Sometimes they are worried that local customers in the University of Tartu may enjoy advantages regarding access to the data. Secondly, support from the public sector is often cooperative but not financial. And last but not least, the chronic lack of funding generally reduces the chances of finding possible means of finance.

In the long run the Archive is likely to remain in Tartu. However, in order to gain additional funding, ESSDA needs additional popularization of data collections through scientific works by graduate students. Present users have for the most part been outside graduate students. For this purpose we firstly need fresh additional datasets and secondly we should develop a very user-friendly service, i.e. we should give customers what they want. If we can find funds from this starting point at the University of Tartu, it would also be possible to extend our services on a more personal basis to other institutions (scientific institutions and the public sector).

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Latvian Social Science Data Archive

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1. Institutional framework

The Latvian Social Science Data Archive (LSSDA) is being developed by the staff of the Institute of Philosophy and Sociology (IFS), University of Latvia. It is the largest scientific sociological center in Latvia. In 2001 researchers working at the Institute received 50 percent of the grants financed by the Latvian Council of Science for Sociology. The Institute's specialists can handle the most complex research projects and also offer high-quality analysis of research results. Most of the Institute's computers are connected to the Internet, a fact which allows researchers to use databases in Latvia and abroad. The Institute's Intranet is being developed at present.

IFS sociologists regularly participate in key projects funded by the World Bank and other international organizations. At present they are taking part in the following international sociological survey projects:

- The International Social Survey Programme (ISSP). Latvia has been participating in this Program since 1995;
- Democratic Consolidation in Central and Eastern Europe: Civil Society and Democratic Orientation;
- "Paths of a Generation", a longitudinal research project involving people who graduated from high school in 1983. Countries from the former Soviet Union are participating in this project;
- Making Agriculture Sustainable: Role of Farmers' Networking and Institutional Strategies, European joint research project funded by the European Commission, DG XII/SEER (Socio-Economic and Environmental Research Program).

The general accessibility of results and conclusions is a very important issue in sociology, not only because data and conclusions often become outdated very quickly, but also because a lack of comparative data makes correct interpretation quite difficult.

2. Main goals

As the owners and users of data collections, IFS researchers are interested in developing the Data Archive and depositing their study results and datasets for several reasons:

1. Storing data in an archive helps to prevent data losses and encourages data providers to control the quality of their data more effectively;
2. Registration of data providers and users ensures better contacts among people with common interests and eliminates the possibility of duplicated research;
3. The archive becomes an important source of secondary data analysis; it allows authors (especially students), who are unable to collect data themselves, to prepare articles, documents and papers. Secondary data analyses reduce the overall cost of research;
4. Data providers and users can easily follow the progress of research in other countries and organizations. An open policy towards data availability leads to the existence of a broader range of analysis and viewpoints, the implementation of new research projects and the emergence of new and alternative research methods; the archive also helps to ensure secondary verification of hypotheses and conclusions;
5. Thanks to specialization, the data archive can more easily perform administrative tasks which are associated with the dissemination of data while files can be maintained in a format that can be updated if new information technologies become available;
6. The archive's system of indexation and cataloguing acts as a source of information in planning new research, as well as in pilot projects;
7. The interdisciplinary nature of the data archive helps to ensure that social scientists are informed about and understand one other. It also promotes the development of links among the social sciences;
8. The archive facilitates the development of comparative research and allows users to investigate theories and hypotheses on the basis of a broader range of data and research that has been expanded in terms of time and space.

3. Funding situation of the LSSDA

On the whole, the science of sociology receives very little funding in Latvia. Only ten sociology grants were provided by the Latvian Science Council in 2001, i.e. a number which is insufficient to ensure development of the science. The LSSDA is currently being developed with the financial support of the Latvian Science Council as an applied sociology project. Compared with other data archives, the facilities of the LSSDA are rather limited due to financial reasons. The funding which the Archive now receives is sufficient to ensure that it continues and that maintenance and accessibility questions are resolved. However, the current level of funding is unable to ensure rapid development.

The LSSDA has received two international grants for technical equipment, one from the SOROS Foundation in Latvia and the other quite recently from the UNESCO/MOST Participation Program (2001). The main goals of this Program are to establish links between social scientists and decision makers, and facilitate interdisciplinary research projects in order to further the balanced development and democratization of society. The aims of these projects are as follows:

- To promote awareness in society of social and political processes in Latvia;
- To improve cooperation between government officials, municipal and non-governmental organizations, and social science researchers.

Fulfillment of these tasks will enable the Archive to develop links between social scientists on the one hand and society, including decision-makers, on the other. Promoting access to the survey results will give the media, self-government and state institution representatives a better understanding of social processes.

4. Data collections

The following data collections are now being developed:

- Bibliographic data which include the following files: newspapers, magazines, books;
- Deposited articles (scientific and press publications), mostly in English;
- Survey collections including datasets in SPSS format, research descriptions, code books and questionnaires;
- Information about social science in Latvia including personal *curriculum vitae* of the social science researchers and descriptions of the operations of scientific centers.

The bibliographic file already has more than 1,000 entries covering the period from the beginning of this century up to the present day. The work of Latvian social scientists who worked outside Latvia during the Soviet occupation is very widely represented. There is also wide-scale representation of scientists whose works about Latvia have been published in journals in other countries.

The code books are being established in accordance with generally accepted international requirements, and include information about the distribution of responses. The research descriptions include information provided by data depositors.

The Archive also provides easier access to other archives, electronic libraries and other information channels in foreign countries. This will allow social scientists and other interested parties to gain access to the information that they need.

5. Future plans

Most of the Archive's information is available in English. Limitations on the accessibility of information will be implemented only insofar as it is necessary to ensure the observation of ethical norms and the protection of copyright. The strategy for the LSSDA is being established while bearing in mind the tendency for the overall volume of data to increase, as well as potential changes in information technologies which could affect work with databases. The goals of the LSSDA are to improve the quality of services and provide new types of data, both from Latvia and other countries, and to make work with existing data bases easier. It is also planned that the Archive will provide training and consultation on data storage and documentation.

Up until 1999 the data collections were accessible only to authorized persons who had SPSS software. One of the urgent tasks of the Archive was to create a data analysis facility for a wider range of persons concerned, especially students of sociology and other social sciences. Cooperation with the Swedish Social Science Data Service (University of Gothenburg) has allowed us to take the first step towards solving this task quickly and with a minimum amount of funds. In 1999 the data from three International Social Survey Program (ISSP) modules (National Identity, Role of Government, Religion) were documented and stored at the Swedish Archive. An agreement has now been reached regarding the possibility of using this documentation system to record further studies.

Users of the Latvian Archive can explore study descriptions, questionnaires and code books on the Latvian website and then perform necessary online data analysis (cross-tabulation, regression and correlation) of the three above-mentioned Latvian ISSP surveys which are archived in the Swedish Data Service. The same Swedish ISSP surveys are also available to our users so that they can compare data from the two countries. One of the prime goals is to master the online data analysis system and to implement it on the LSSDA server.

The Data Bank of Sociological Research: A Tool for Studying Problems in Modern Russia

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1. Description of the Data Bank of Sociological Research

The problem of storing empirical sociological data arose in our country in the late 1960s at a time when the first large-scale sociological studies were being carried out. However, it was only in the early 1980s when computers became widespread that the question of an automated information system serving the needs of sociologists moved into the practical realm. Computers are being used increasingly by sociologists to collect, retrieve, manipulate and analyze sociological sources and to present the sociological knowledge thus acquired.

An important by-product of this activity was the creation of computer-readable resources. In order to ensure long-term preservation and wider dissemination of these resources within the academic research and teaching communities, the Data Bank of Sociological Research (DBSR) was founded. It was established at the Institute of Sociology of the Academy of Sciences of the USSR in 1985. In the first place, the Bank's principal purpose was to store empirical data from sociological studies in a way suitable for repeated use. In 1987 this Data Bank was given All-Union status under the sponsorship of the Soviet Sociological Association. The Data Bank was set up with the cooperation of a number of researchers and organizations interested in the joint use of accumulated empirical data. These organizations represented practically all the regions of the former Soviet Union. Unfortunately after the collapse of the Soviet Union the territorial scope of the Data Bank was reduced. Since 1992, because of the political developments and the resulting breakdown of communication links between the former Soviet republics, the Data Bank has been forced to confine itself solely to Russia. However, the material accumulated by the DBSR reflects more than 30 years of life in our society and therefore has tremendous scientific and practical value. It still contains essential information on Russian society as well as on the other parts of the former Soviet Union ranging from Central Asia to the Caucasus, the Baltic states, Moldova, Ukraine and Belarus.

When we now take into account the fundamental changes which have swept through our society since 1991, we can see that these data are unique and have historical importance. Secondary analysis of the data will allow researchers to trace and locate the origins of many social and economic processes not only in modern Russia but in other new states as well.

The principle on which the Data Bank is based is the concept of consolidation and integration of sociological data. Consolidation refers to the accumulation of a large quantity of empirical data, which provide the basis for conducting secondary and comparative analyses of datasets produced in various sociological research centers. It opens up wide opportunities for social modeling, numerical experiments, verification and evaluation of methodology, as well as the formulation and solution of methodological problems.

Data integration calls for the integration of separate data into a system of interdependent indicators which describe society as a whole and in its parts. In spite of long drawn-out discussions on the structure of the indicator system for separate sociological phenomena, there are still many problems relating to methods and methodology.

In spite of these problems, the project involving the integration of separate indicators into a system was completed by the Data Bank's staff. Based on the empirical information obtained between 1966 and 1997 during several (about 10) large-scale projects, a catalogue of all variables of these projects was compiled. These variables represent the tool for gathering data relating to mass media communication. The entire conceptual apparatus of sociological studies has therefore been standardized and computerized. The result is the database "Integrated informational system of social data", which is registered in the Russian Scientific Research Center "Informregistr" (the administrator of the database is A. Zhavoronkov).

2. Data Collections

DBSR refers to multi-functional information and analytical systems aimed at one goal: the accumulation of different sociological information in a systematic form, including empirical data, for increased efficiency in its use.

About 700 studies conducted by the Institute of Sociology and other research centers in the former USSR between 1966 and 2001 are stored in the Data Bank. They include over 20 Union-wide (USSR sample) studies and about 15 All-Russian public opinion polls which were conducted during the last ten years and reflect all aspects of life in modern society, including the political and structural changes that have taken place over the last decade.

The DBSR contains research on social tension, national conflicts, stratification of society, the emergence of new classes, strata and groups, problems during the transition to a new political and economic structure, problems of families and children, the status of women, problems of youth and education, structural changes in society, public opinion with regard to elections of deputies and presidents, political parties, ecology, demography, etc.. The Data Bank has accumulated datasets relating to the following types of research:

1. "Members of Komsomol about Komsomol" is an All-Union study of young people which was conducted by the Institute of Public Opinion of "Komsomolskaja Pravda" in 1966 and presented to the "15th Congress of Komsomol" (3100 cases).
2. General project entitled "Function of public opinion in urban areas and activities of the state and public institutes". This entails unique systematic research with the aim of determining all information flows between state authorities and the population of a medium-sized urban town, conducted in 1967-1969. The project involves about 100 studies reflecting all aspects of mass-media communication in a medium-sized urban town in the USSR.
3. The goal of the all-Union study "TSIOM-71" was to calculate the extent to which the population of the USSR is supplied with durable consumer goods, the demand for goods, public opinion with regard to excessive consumption of strong beverages, money savings, etc. (2345 cases).
4. All-Union studies "Way of life of the Soviet people ". The first study was conducted in 1981 while the second one was implemented in 1986 and 1987; each study contains more than 10,000 cases.
5. All-Russian public opinion poll "Modern Russian Society". This project started in 1992; each file contains about 2000 cases or more.

3. Functions

Out of the Data Bank's many functions I would like to emphasize the following:

- Improvement in methods, methods of accumulation and analysis of sociological information;
- Methodological research with the aim of standardizing the methods and separate blocks of indicators for subsequent comparative analysis of the data obtained at different times, from different territories and in different social and cultural environments;
- Information and reference resource for sociologists;
- Coordination of sociological research by informing users about recent research and new empirical data;
- Exchange of primary empirical data access;
- Provision of conditions for secondary and comparative data analyses;
- Calculations based on commercial agreements, including sociological modeling, experiments, etc.

Factors such as technological progress, the continuous increase in the volume of data to be stored and the growing information needs of sociologists are constantly being taken into account during the development of the Data Bank. Its goals and functions determine how information is stored. It consists of the following three databases:

1. Study descriptions (topic, time, methods of gathering data, sampling procedures, etc.);
2. Documentation of the studies (questionnaires, code plans, codebooks)
3. Data on empirical studies, stored in computerized form (SPSS format).

The data are divided into three classes based on their accessibility for users. Authors wish to reserve their rights to the results of their studies for a period of time, after which their data are placed in a more accessible class.

The users of the DBSR include scholars and research groups conducting theoretical or practical work in sociology. They provide the Data Bank with material from their own research and obtain in return information which they require. In addition, the Data Bank informs its users about new data received by the Data Bank and publishes a frequently updated data catalogue (1).

4. Prospects

Thanks to advances in computer science, modern technology has provided a major boost to the modernization of the Data Bank. Improvements which are now being implemented are based on conceptions of universally accessible services with interactive access. These improvements in the Data Bank's infrastructure will stimulate researchers' interest in developing the national network of sociological information and attract investment. Modern communication technology between various research centers will reduce the costs of creating and maintaining archives. Consequently, researchers will have access to the Data Bank's computing power and information resources.

The main endeavors during practical implementation of the above conception are directed towards the following goals:

- Universal and accessible services for users: creation of an information search system, the establishment of a special database for registered studies, the implementation of interactive information access facilities;
- Mobility of data, which presupposes compliance with storage standards, permitting information input, retrieval and exchange as well as the protection of intellectual property;
- Development of a telecommunications network which connects various centers where sociological data are stored and analyzed, and provides access to the powerful technical and informational resources of DBSR;
- International cooperation and coordination of efforts aimed at including the Data Bank into the worldwide network of archives and banks of sociological data.

Achieving these goals will permit the modernization of the existing system which serves sociologists' needs, eliminates incompatible database formats and creates a network infrastructure for the collection and distribution of knowledge on our society. Let's discuss some of these goals in more detail.

Accessible service

Attaining this goal will ensure convenient and efficient interactive information access and exchange. It will revolutionize information searches and permit easy access to information resources. The aim is to achieve these goals by creating an interactive information retrieval system to serve the integrated datasets. Another way to solve this problem is adaptation to sociological databases of the information retrieval system "Russia", which was developed by the Research Computing Center of Moscow State University. This integration will help to solve different kind of problems concerning the development of software and the unified indicators' system, and will provide standard approaches, something which is necessary for the Bank's activities.

However, well-organized resources and effective means of access can only produce the expected benefits when every researcher is sure that he/she will find the requested information. For this reason, the existing three-level access system of DBSR will be reviewed and changed in favor of greater accessibility (while observing the authors' rights). Business-like openness of DBSR is the principal idea of universal services.

The information environment is quite variable. Empirical datasets come in different amounts and in a variety of types. The consolidation of stored information and its integration into a database provide full and coherent information on any of the registered projects. This type of environment supports many types of information subjects and establishes connections and relations between subjects which are easily discernable. This approach is based on the strategy towards an open architecture of the DBSR, which refers to a collection of a number of independent information sets unified in integrated databases and to ready access to this information and automated search. The machine-readable catalogue connects all types of information contained in the Data Bank.

Data mobility

Creating the integrated system means that the stored information must be standardized. This can be achieved by developing standards for new data and adjusting the existing data to make them conform. The specification for the standards for new data is based on established world standards, and this standardization will boost extensive exchanges of information. The mobility of data will permit the distribution of initial and secondary analysis in the telecommunications network. Users are thus guaranteed a conflict-free interface. The new standards will cover the elements of the catalogue and the elements

of databases making up the integrated medium. First of all, the standards are applied to research data stored in the DBSR as SPSS files. (The majority of the collection of datasets were portable files exported from the mainframe tapes to a PC in a zipped format. At present they are represented in SPSS format, some of them are portable files and the others are system files with all the necessary documentation). The new standard must take account of various software options, make allowance for the reliable storage and presentation of information, and assure compatibility with world standards for free export and import of information. When it comes to ensuring the mobility of data, the question of authors' rights and the related issue of regulating access to data are other important considerations. Registration and identification of users, as opposed to the three-level access system, seem to be the most constructive approach. The mobility of data will promote international cooperation which will in turn, significantly improve the DBSR's position in Russia. However, it is impossible to reach the goal of data mobility without bilingual documentation of datasets. To date this has unfortunately been a weak point in the activities, and the DBSR is trying to solve this problem.

Unified telecommunications network

Organizing a unified telecommunications network will promote the process of accumulation of empirical datasets from the other research centers in the DBSR, and will provide users with modern access methods to the Bank's resources. On the one hand, local and distant researchers will be able to use the universal services of the DBSR and to interact with other research centers subscribing to this network. On the other hand, they will be able to interact with the DBSR to add information to the Data Bank and have direct access to it.

International cooperation

The core of all foreign and Russian information centers is the idea of international cooperation. It is especially relevant to Russia where the support for the DBSR's efforts in aggregating and transforming datasets to conform to international standards and following the strategy of the DBSR's development will allow for the preservation of unique data on society in the socialist period and its subsequent transformation. International cooperation will be of great benefit in the process of collecting new empirical data on the formation process in society and will play a decisive role in the integration of local national centers.

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Compiling an Open Sociological Archive in Russia

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Russian Public Opinion Research Center (VCIOM)

1. The pilot project

In September 1999 VCIOM initiated a project with the aim of creating an open sociological archive, an institution that had existed in Russia never before. The financial support for this project came from the Ford Foundation. The project manager is L. Khakhulina and the project coordinator L. Kosova.

It had become obvious by then that there was a definite need for such an archive. Starting in the late 1980s, sociologists had spoken about the need to create a national archive on several occasions. However, it was not until the late 1990s that all the necessary conditions for this were available. *Firstly*, various sociological organizations had acquired experience in conducting surveys which were representative of Russia, as well as international surveys which were of scientific value to a wide circle of researchers. *Secondly*, in addition to these organizations, there was an increasing number of individual researchers and teams of researchers who were conducting sociological surveys including studies financed through grants from Russian and foreign funds, for example the Ford Fund. The data obtained in these surveys, however, were used only by the researchers themselves and were unavailable to other users, a fact which runs counter to the very idea of this support. *Thirdly*, the development of sociological education in Russia over a period of at least 10 years had resulted in a wide circle of potential users of sociological data (students, post-graduates, teachers), who were unable to conduct surveys themselves. *Fourthly*, modern electronic technologies made it possible to solve the problem of storing and disseminating the data in a more efficient way than 15-20 years ago. Taking these facts into account, we set ourselves the following tasks:

1. To create a pilot version of the archive on the basis of surveys conducted by several leading sociological institutes which had expressed an interest in compiling the archive;
2. To formulate the main principles of arranging, storing and disseminating the data using international experience in Russia;
3. To establish the organizational and legal relations with institutes and individuals acting as depositors and users of the archive.

2. Results

The main feature of our approach is that this work is done by VCIOM in cooperation with other sociological institutes which conduct representative surveys. The implementation of the project has yielded the following results:

- At present the archive contains over 40 surveys conducted by VCIOM and other organizations which took part in compiling the archive.
- The working variant of an information retrieval system which enables users to find the necessary information.
- Standards of survey data archiving have been formulated and tested, and are registered in two documents: “Guide for depositors” and “Agreement on data archiving”.

Data holdings

Since we are just starting to compile a sociological archive, we limited ourselves solely to archiving data from quantitative surveys. Out of all the quantitative surveys, our priority was those in which consumers show the most interest (as requests to VCIOM archive show). These are:

- National sociological data from the past 3 years, which were obtained in the course of representative population surveys;
- Data obtained from comparative international studies in which Russia took part;
- Electoral data;
- Sociological trends.

We now have 3 types of survey in our archive:

1. Data from regular surveys on the national representative sample (over 40)
2. Data from international comparative surveys (ISSP)
3. Some trends:

1998-2000 monitoring of social changes in Russia (875 variables)

1998-2000 consumer attitudes index (70 variables)

1999-2000 electoral surveys (37 variables)

1975-1999 time budgets (77 variables)

The requirements relating to the surveys deposited in the archive are practically the same as in all other archives. Of course, additional work had to be done to harmonize the surveys with the archiving requirements. This work was carried out by the organizations (individuals) which deposited their surveys in the archive.

In the pilot stage payment was made for the work involved in harmonizing the data and documentation with the rules of archiving. During the first stages of compiling the archive it was firstly necessary to get potential consumers interested in depositing their surveys and secondly to obtain information for the archive which could meet the requirements. However, this task – encouraging the consumers to deposit their surveys in the archive and doing the necessary work preparing their data for the archive – is still one of the main aspects of our work with potential depositors. Another problem that we faced is archiving sociological surveys from the Soviet period, i.e. the surveys conducted at a time when there were no personal computers. The change from one storage format (large electronic computing machines for common use) to another format, which was caused by the changeover to personal computers, coincided with the transitional period, which was difficult for many sociological institutes. As a result, a large number of the surveys are stored in old formats and require a lot of work to convert these data into the modern format. We are intending to convert these data together with the interested institutes. With our assistance, the Department of Sociology of the Institute of Economic and Industrial Engineering has converted the 1975-1999 time budgets into the SPSS Portable file. We are doing this because we believe that the archive is a national information resource storing a part of the cultural heritage of the nation.

The information retrieval system

It is well known that an information search firstly involves developing a rubric and secondly coding and classifying the surveys and questions in the questionnaires by these rubrics. We have designed a list of rubrics (making use of the UNESCO materials). We plan to use it in the information retrieval system which will automatically classify the surveys (names) and questionnaire questions. We are carrying out this work together with the information system «Russia» designed by Moscow State University using their thesaurus and software.

Regulation concerning data depositing and access

We have worked out (and signed) documents which regulate the relations between the archive as an independent institution and the depositors. Documents regulating relations with the users are currently being developed. These relations are based on conceptual ideas common to all archives. Briefly, they can be formulated as follows. We regard the archive as a social institution established on the basis of a voluntary agreement of owners of sociological information and its users for the purpose of its storage and

dissemination, i.e. to make it accessible to the users. The broad aim in establishing the archive is to promote scientific research in the field of social sciences. The archive therefore ensures that information is stored and also takes responsibility for its physical safety. The archive distributes this information among users in order to promote scientific research in the field of social sciences. Both of these functions are extremely important for Russia. First of all, conducting sociological surveys is becoming more and more expensive and the demands made on them are increasing. This is the reason why it is becoming more important than ever to use sociological data which are already available. Secondly, not every sociological institute has its own archive. In Russia this means that the preservation of survey data often lies in the “hands” of those bodies who conducted the surveys. The data therefore not only become unavailable to users, but may also be lost over the course of time.

The task of working with information owners means making it common practice to deposit data in the archive and widening the range of organizations which can supply information, including grant-holders' information. At the same time, the most important criterion for compiling the archive is not just more depositors, but also the quality of the information deposited. As our experience shows, the right to information is an important issue in the relations with the depositors (organizations and individuals). Proceeding from the general rules, we believe that the owner of information is its “producer”, while the archive only has copyright for the information to fulfill certain functions (storage and dissemination). The legal relations between the “producer” of the information and the archive were determined in the agreement on depositing information where the rights and liabilities of each side were described. Our next task is to harmonize this agreement with the current legislation of the Russian Federation, which regulates the relations between the depositor and the archive.

The relations between the archive and the users of the information are also based on agreements in which the rights and liabilities of each party are specified. Information is provided to the user free of charge for secondary analysis for academic purposes and for teaching. The user may have to pay some costs which were incurred in data preparation, but he/she does not actually pay for the data. Since we now have the task of attracting users and making them part of the sociological community, these expenses are currently covered by the grants received for the development of the archive.

The legal aspect of the relations between the archive and the user also needs to be seriously substantiated from the point of view of Russian legislation.

3. Prospects

The work on compiling the archive will be continued in all the directions described, namely:

- Increasing the number of surveys to be deposited;
- Improving the information -retrieval system and starting to work with users via the Internet (beginning in April or May this year);
- Working out the legal documentation for registering the relations with depositors and users;
- Establishing and maintaining constant contacts with foreign archives.

We are about to receive a three-year grant for further work on compiling the archive. This grant will enable us to make greater progress in solving the task that we have set ourselves. As for the main tasks, we believe they are as follows:

1. The first task is to create in the Russian sociological community a stable stereotype of archiving the data and their further use for secondary analysis. In order to attract depositors and promote the archive, we propose establishing an Expert Council whose members could evaluate the progress made in the implementation of the project and prospects for the work now being carried out to create an open sociological archive. There are already a number of specialists, sociologists and statisticians who are prepared to cooperate with the archive in both depositing their surveys and participating in the discussion concerning its work. In order to attract users, we are planning to hold a yearly university-based seminar to inform people about the archive and teach them how to use secondary analysis methods.
2. The second task is to find the kind of organizational and financial structure which would allow the archive to function as an independent institution in future.

The Data Archive Project in the Republic of Slovakia

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1. Introduction

Creating the social science data archive at the Institute for Sociology of the Slovak Academy of Sciences (SAS) is quite a new activity at the Institute. We started with project proposals and an official application for a VEGA grant (Slovak Scientific Grant Agency) in 2001. After being classified as a success, the Data Archive Project (DAP) formally started on January 1, 2002.

Quantitative research is a standard instrument for testing theory. In social science in Slovakia it can be said that it is the most frequently used strategy for collecting empirical evidence. Recent developments in the area of information technologies (IT) and new advances in computer-aided statistical analysis are leading to an increase in quantitative analysis of electronic data.

At present, there are many potential machine-readable data sources suitable for secondary analysis in Slovakia. Data are primarily produced by academic and educational institutions, state administration institutions, profit-making public opinion and market research agencies, and different non-profit-making foundations and associations. On the other hand, it is possible to observe growing demand for older research data, for example in the academic environment where comparative and longitudinal research increasingly predominates. Researchers or students in Slovakia often face problems relating to access to research data and the reliability of such data. This problem highlighted the basic need for a solid background to secondary analysis in Slovak social science. And to create such a background is a main goal of the DAP.

The fact is, archiving of social data has no tradition in Slovakia and its benefits are not obvious to everyone. Nowadays, positive examples of already established and functioning archives in Europe are very beneficial in demonstrating the advantages of data archiving. Moreover, the main ideas in data archiving provide us with many inspirations and useful stimuli. The general objective of the DAP is to change from the current informal practice of storing research data (which unfortunately predominates in Slovakia) to more complex and standardized archiving methods and procedures. A comparison of the benefits of the two approaches to archiving research data, i.e. the informal and the standardized approach, proves beyond doubt the advantages of the latter. We can see the major benefits of archiving infrastructure, especially in the three following dimensions:

Archive as an instrument for easy and independent access to research data

What exactly does it mean to be a prospective user of social science data in Slovakia today? In order to acquire the dataset, you must carry out your own search for the history of a relevant field of the research, search for the datasets in the memory of the researchers and then contact the research team which produced the relevant data and negotiate with the researchers about access to these data. However, this time-consuming activity is still no guarantee that the data will be obtained in a suitable format and of sufficient quality, so that they can be used for the purpose of secondary analysis.

The above-mentioned shortcomings could be solved by using highly promising general characteristics in systematic archiving of available empirical research data (for example access to primary data catalogues and adequate documentation of the datasets, access to the data by itself – datasets concentrated in one place and in compatible formats, data quality control, data security against inadequate changes or losses, transparent rules for dataset access, exchange and distribution, etc.)

Archive as an instrument for controlling and improving social research

One of the basic ambitions of the researcher is to back up his or her theory with evidence in a clear and transparent manner. However, there are several historical examples of scientific malpractice which highlighted the problem of validity and reliability in social science. Independent access to primary data increases the number of options for verifying the results and the research testing instruments or methods which are used in secondary analysis of the research data. The issue of archiving is therefore highly topical in Slovakia.

Archive as an information and communication channel

A summary of available empirical research data (or a catalogue of social datasets available in an archive) provides users with an overview of the subject areas of the research in the country and the researchers engaged in the research project. This indirect information enables new contacts to be made within the scientific community and increases direct cooperation in the field of comparative research. Newsletters and bulletins on current research projects, the provision of available data or offers of cooperation are all efficient ways of supplying information on past activities and new aspects in the field of empirical research.

2. Data Archive Project (DAP)

One of the first tasks of the DAP team is to create a catalogue of the sociological data which are available at the home organization, the Institute for Sociology of the SAS. We now concentrate on electronic data from surveys carried out in the 1990s. As already mentioned before, this type of summary of available empirical research data provides users with an overview of the subject areas of research in Slovakia and a list of the researchers involved in the research project. On the other hand, these datasets will also act as an initial “experimental” group of datasets for the early phase of DAP.

As we have already started, we can see the future in more detail. We are now in a preparatory phase, which means collecting available information and documentation on datasets. The key problems in making a complete summary of available datasets include a lack of original materials (questionnaires, forms) and the non-availability of adequate original documentation of relevant datasets (sampling procedure, method of collecting the data, researchers). Generally speaking, the older the dataset, the less material that is available.

On the other hand, we are fortunate that we can build on the experiences of the other archives in Europe. These archives have a longer tradition and have already developed archiving standards and working methods. Many of these standards are also suitable in our context, i.e. rules for data description or rules for access to and distribution of data. It appears as if these standards will also fully satisfy all the requirements of the scientific community in Slovakia.

In addition to these basic standards and methods used in archiving social data, we can see the rapid progress which followed the application of IT and is demonstrated, for example, by the NESSTAR Project (Networked Social Science Tools and Resources). In future we would like to follow these trends and also adopt more sophisticated standards and methods relating to the application of virtual data libraries. However, we expect that the adoption of these standards will require more specialized training for staff and will also lead to some special requirements as regards hardware and software.

3. Selected Surveys between 1990 and 2001

The most important representative surveys available at the Institute of Sociology of the SAS are described in the Table 1.

Table 1: Selected Surveys of the Institute of Sociology of the SAS

Year	Title of the study	Countries	Notes
2001	ISSP: Social Inequality 2001	cross-national	http://www.issp.org/
1999	European Values Study 1999	cross-national	Coordinator: Loek Halman, Tilburg University, Netherlands http://evs.kub.nl
1998	ISSP: Religion 1998	cross-national	http://www.issp.org/
1997	Elite Recruitment in Slovakia	Slovakia, Czech Republic, Hungary	Coordinators: D. Treiman and I. Szelenyi, University of California Los Angeles, USA
1996	ISSP: National Identity 1996	cross-national	http://www.issp.org/
1995	Actors and Strategies of Transformation and Modernization	Czech Republic France, Poland Slovakia	Part of the project "System Change and Modernization", coordinator R. Sainsaulieu, France SR: 956 respondents
1993	Social Stratification in Eastern Europe after 1989	Bulgaria, Czech Republic, Hungary, Poland, Russia, Slovakia	Coordinators: D. Treiman and I. Szelenyi, University of California Los Angeles, USASR: 4920 respondents
	Opinions about Social Change 1993	Czech Republic Slovakia	SR: 1223 respondents CZ: 1903 respondents
The division of Czechoslovakia into the Slovak Republic and the Czech Republic (on 1.1.1993)			
1992	Civil Society in the Slovak Republic	Only in the Slovak part of Czechoslovakia	1021 respondents from Slovak population
	ISSP: Social Inequality 1992	cross-national	http://www.issp.org/Czechoslovakia : n=1101 (where: SK: 423 respondents and CZ: 678 respondents)
1991	European Values Study 1991	cross-national	http://evs.kub.nl Two separate surveys in the Czech and Slovak parts of Czechoslovakia.
	Study of Social Structure Transformation in Czechoslovakia	Czechoslovakia	SR: 977 respondents CZ: 1872 respondents
July 1, 1990	The Institute for Sociology of the Slovak Academy of Sciences was re-established.		

These surveys concentrated mainly on the study of social stratification, attitudes and values. Most of the surveys are limited to the geographical region of Slovakia (age mostly 18+). However, in some of the samples the population is represented by inhabitants of Czechoslovakia (because of the division of Czechoslovakia into the Slovak Republic and the Czech Republic on 1.1.1993).

Since all these data were produced by the Institute for Sociology, we have full responsibility for defining access rules. According to the experiences of the other archives, we assume that the prospective users of the data bank will be mostly researchers and students. These people are our primary target group and our task is to make them familiar with the data archive mission. For Slovak students of sociology and the other social sciences, for example, it will be an unique opportunity to acquire "real" data as universities are rarely involved in the research projects which generate the representative

surveys. One can say that universities in Slovakia are more education-oriented than research-oriented (in the field of social sciences we can say exclusively education-oriented). However, the situation is quite different in the field of natural sciences, engineering and technology where applied research at university is a common practice. Unlike university, the Institute of Sociology of the SAS (or its predecessors) has (have) always been involved in empirical research projects (apart from the strange period in the 1950s when sociology was labeled a “bourgeois pseudo-science” and all its activities were stopped until the late 1960s). At present the Institute is an “umbrella institution” for several comparative cross-national research projects and networks such as the International Social Survey Programme (ISSP), European Values Studies (EVS), etc.

4. Information on the Research and Development (R&D) budget in Slovakia

In the last decade science and technology (S&T) in Slovakia underwent several fundamental changes. These changes included new elements, of which a free market economy is the most important one (51% of R&D organizations in 2000 were from the business enterprise sector). As we can see, we are talking about a change at the macro-level. It is an ongoing process accompanied by the introduction of new legislation. We could describe this change as a S&T institutional transformation and reintegration within the scope of Slovak society. The key agents in this change at government level are: The Commission of the Government of the Slovak Republic for Science and Technology and The Ministry of Education (SR). In 2001 the Government of the Slovak Republic adopted “The Conception of the State’s S&T Policy up to the Year 2005” and also defined a set of measures for its implementation.

Table 2: Gross domestic expenditure on R&D (as a percentage of GDP)¹

	1993	1994	1995	1996	1997	1998	1999
Slovakia	1.45	0.96	0.98	0.97	1.13	0.82	0.68
Neighboring States:							
Czech Republic	1.21	1.10	1.01	1.03	1.17	1.27	1.29
Poland	-	0.76	0.69	0.71	0.71	0.72	0.75
Hungary	0.97	0.88	0.73	0.65	0.72	0.68	0.68
Austria	1.47	1.54	1.56	1.60	1.69	1.80	1.80
World:							
European Union	1.88	1.83	1.81	1.81	1.80	1.81	1.85
USA	2.52	2.42	2.50	2.54	2.57	2.60	2.64
Japan	2.68	2.63	2.773	2.83	2.90	3.04	3.04

Despite an official declaration which highlights the importance of the development of S&T in contemporary society, a great many government intentions have not been implemented due to insufficient financial resources from the national budget. The negative trend in the support for R&D (expressed as a percentage of GDP spent on R&D) is clear. A comparison between the share of total expenditure on R&D in 1993 (1.45% of GDP) and 1999 (0.68% of GDP) reveals that expenditure has decreased more than twofold. Among the Visegrad Four countries it is the smallest share, as shown in Table 2.

According to the latest report by the Statistical Office of the Slovak Republic on R&D in the year 2000, the share of total expenditure on R&D in gross domestic product remained almost the same as in 1999 (0.69% of GDP). This fact proves that, despite the latest assurances by the government to increase the share of R&D regularly every year up to a figure of 1.8% of GDP in 2005, the practice remains the same (1).

On the other hand, there is one positive trend in the funding of the R&D sector in Slovakia, i.e. the growth in the resources received from the business enterprise sector (54.4%). However, the share of public resources is still substantial (42.6%) and the rest is unfortunately not so significant (3 %, see Table 3).

Table 3: Structure of R&D expenditure in 2000 according to funding resources (as a percentage of total expenditure on R&D)²

	Percentage of total expenditure	Tendency 00/99
Government and public sector	42.6	97.5
Business enterprises	54.4	126.9
Loans in current year	0.4	15.2
Non-profit-making organizations	0.05	219.8
Foreign resources	2.3	111.1

Looking at the latest R&D indicators published by the Statistical Office of SR (3) we can see that the following basic data describe the situation in 2000³:

- Expenditure on R&D as a percentage of GDP: **0.686**
- NB expenditure on R&D as a percentage of GDP: **0.292**
- NB expenditure on R&D as a percentage of total expenditure in the NB: **1.075**
(which is 93.4% in the year 1999, that means a decrease of 6.6% in 2000)
- Share of NB expenditure on R&D as a percentage of total expenditure on R&D: **42.6**
(which is 89% in 1999, that means a decrease of 11% in 2000)

As we can see from these macroeconomic indicators, the situation regarding R&D funding from the public sector has not improved as expected. (4) When looking at the distribution of total expenditure on R&D from the aspect of science (see Table 4), there is no doubt that natural sciences enjoy a privileged position (in 2000 – 78.7% compared with 1999). By contrast, the share of social sciences is tending to drop (in 2000 – 12.8% fall compared with 1999).

Table 4: Structure of R&D expenditure in 2000 according to basic fields of science (as a percentage of total expenditure on R&D)⁴

	Percentage of total expenditure	Tendency 00/99
Natural Sciences	26.29	178.7
Engineering and Technologies	47.07	96.4
Medical Sciences	8.08	81.1
Agricultural Sciences	11.81	116.5
Social Sciences	5.82	87.2
Human Sciences	0.93	99.8

The R&D sector in Slovakia in 2000 contained about 303 research organizations employing around 22,256 people (71% researchers +20% technical and equivalent personnel +9% support staff). Social science personnel represent 15.5% of total R&D personnel (measured in man-years, Table 5).

Table 5: Structure of R&D staff capacity in 2000 according to basic fields of science (man-year as a measurement unit, As a percentage of total R&D capacity in man-years)⁵

	Percentage of total capacity	Tendency 00/99
Natural Sciences	24.5	128.9
Engineering and Technologies	38.5	92.3
Medical Sciences	10.5	81.4
Agricultural Sciences	7.9	60.8
Social Sciences	15.5	139.6
Human Sciences	3.1	134.8

The negative trend is aging of R&D staff in Slovakia. The average age of researchers is 45 to 46 while the corresponding figure abroad is 40 to 41. Nowadays, the share of young people (up to the age of 29) working in R&D fluctuates between 14% and 18% (lowest in the R&D state sector – 13.4% and highest at universities – 18.1% of young people). One typical characteristic is the high level of fluctuation among young scientists.

According to the results of the survey, the main reasons for low motivation are often connected with the lack of sufficient material conditions, e.g. low earnings and the poor housing situation. A low level of motivation regarding scientific work also results from inadequate and old IT equipment (especially at universities), lack of scholarships for young researchers and a lack of research mobility grants.

The average income of young researchers – up to the age of 30 – in 2000 was 68.4% (= SKK 7,694 = EUR 178, \$160) of the average income in Slovakia (= SKK 11,241 = EUR 258 = \$234). As declared in the latest "Conception of Motivation...", the average income of young researchers should reach the minimum level of 115% of average income in Slovakia. (5)

As we have described above, there are several positive as well as negative trends regarding the development of R&D in Slovakia. The most significant positive trend includes an increase in commercial resources spent on R&D, which reached 54.4% of total expenditure in 2000 (in 1990 we started at 0% as no private business enterprise resources were available in the former socialist state of Czechoslovakia).

However, the negative trends appear to predominate. The most important indicators include a regular decrease in the share of R&D in GDP and the national budget, aging and the lack of members of the younger generation in the scientific community in Slovakia.

Notes:

- 1 Source: OECD, MSTI Database, May 2001 (2).
- 2 Source: Statistical Office SR, November 2001. (8) Tendency 00/99= comparison between R&D indicators in 2000 and 1999, value of the indicators in 2000 as a percentage of the value in 1999.
- 3 GDP= Gross Domestic Product, NB= National Budget Slovakia.
- 4 Source: Statistical Office SR, November 2001. (8) Tendency 00/99= comparison between R&D indicators in 2000 and 1999, value of the indicator in 2000 as a percentage of the value in 1999.
- 5 Source: Statistical Office SR, November 2001. Tendency 00/99 = comparison between R&D indicators in 2000 and 1999, value of the indicator in 2000 as a percentage of the value in 1999.

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The Romanian Social Science Data Archive

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1. The Archive's situation

The last meeting of the Eastern European Data Archives was the Forum at the IASSIST Conference which was held in Amsterdam in May 2001. Many applications were submitted, some of them well-structured and some only at the drawing board stage. There was considerable interest in creating a network of social science data archives in this part of Europe, both from EU countries and the former Eastern European bloc. Scientists are starting to realize the crucial importance of having and sharing reliable data for formulating social policies, in spite of a deep-rooted feeling of protecting data against any person or institution.

In Romania this type of open approach emerged from the Institute for Quality of Life (IQLR) Research in Bucharest. A great deal of social research was carried out after 1990, resulting in a large number of datasets which needed care and attention. Having lost some of the old datasets and/or some variables from others, a specialized data bank was created within the Institute.

These datasets were not properly stored, instead they were merely saved in different folders from one computer to another. From 1994 onwards the idea of a specialized data archive emerged based on the model of the already existing data archives from Western Europe. We began to talk about codebooks, cleaning, indexing and cataloguing, but only as separate operations without a compact system to include all of them. There was no search engine and no method of searching for relevant variables or indicators; keywords were listed only in the printed study descriptions and they referred solely to the datasets and not the variables within. Practically the only users were researchers from the Institute and some academics from the University of Bucharest, who knew about the existence of these datasets. If another user wanted information about variables or datasets on one topic or another, they rarely obtained this information.

In 2000 and 2001 two useful training visits were paid to the UK Data Archive (UKDA) and the Central Archive for Empirical Research (ZA) in Cologne, Germany. These valuable opportunities to obtain fresh information and know-how on archives opened up new prospects for the emerging data archive in Romania. Up-to-date standards such as DDI (Data Documentation Initiative) were to be implemented from the very beginning, with the advantage of not having to migrate the datasets from one standard to another. Extremely useful software was generously shared both by the UKDA (with the Networked Social Science Tools and Resources System – NESSTAR) and by the ZA (with Codebook Explorer). The NESSTAR system was of particular interest to us because it contains everything we did not have: it is based on the new standard in data archiving – the DDI, it has a search engine and it uses new compact codebooks based

on the structure of the DDI/DTD. Software for preparing the NESSTAR compliant codebooks were downloaded from the NESSTAR website (NSD XML Generator, NESSTAR Publisher), completing the suite of specialized software.

In principle, this was exactly what we needed in order to create a specialized data archive. The only thing left was to obtain some work on using the software.

2. Major difficulties

We were faced with inevitable difficulties regarding our plans and we tried to find effective solutions, in spite of an acute lack of funding (at that time). In fact, these acute financial problems are very common in Eastern European countries.

One option is to wait for some funding to start the process – the worst possible choice in our opinion; the other option is to find quick solutions to specific problems, make as much progress as possible and hope that funding will appear sooner or later.

In our case, this strategy produced good results; the Romanian Social Science Data Archive (RODA) is now on a very promising path.

The major difficulties (apart from the funding problem) we encountered were as follows:

Lack of regular staff: in order to obtain continuous results on time, we need people working as much as possible for the data archive. In fact, the current situation is that IQLR employees are working on different projects with field work and combined deadlines in addition to the planned papers and theses they have to prepare. Working for the data archive is more like a temporary job; people are not very motivated by the perceived boring process of cleaning, documenting and indexing datasets, especially if there is not so much money involved. We had to deal with the situation in these circumstances and try and make progress a step at a time.

Lack of training: the software which we acquired for our work, although (relatively) simple, still required a certain amount of training. Notions about DDI and its structure, NESSTAR, XML Generator, NESSTAR Publisher, XML, XSL, XML editors can be quite hard to deal with at short notice. This is the reason why in the first two months we had barely managed to assemble a small team which knew how to work with all this software.

Lack of information about “old” datasets: in the case of datasets from 1990 onwards, information is hard to acquire as we go back in time. For some datasets from 1990, 1991, 1992 and 1993 there is no longer any information available because at that time nobody knew about how important it is to document a dataset. This is why, although we are very frustrated, we have to admit that some datasets will probably never be recovered; or for some variables from other datasets we do not have the labels, etc. We spent a great deal of time trying to find this kind of information, and we are still doing it.

Lack of a fast Internet link: in order to properly distribute data to the academic community and interested persons, we definitely need a fast Internet connection. On the one hand, this means a website which can be loaded on any machine; on the other hand, the NESSTAR system requires (at least for the Explorer version) 128MB of RAM. Of course, any person could use the Light version, but there is a need for a fast and continuous Internet connection for the downloading process.

3. Major achievements

With the academic community anxiously waiting for the data archive to be constructed, two obvious questions arise, which are also common to all emergent data archives in Eastern Europe:

1. How to reach a certain level in order to be recognized as a professional data archive by the international community? And:
2. How can we achieve this goal at little or no cost because our financial resources are very limited?

One initial idea is to examine the other data archives on the Internet, see how they do it and try to duplicate whatever they do. We have done this by analyzing tens of data archives all over the world. We have concluded that each archive is based on the same fundamental principles. This was good news because we found some principles to apply. At the same time, however, each data archive applied those principles in a more or less different way. This was not such good news and was not very helpful.

Having set out this objective, we ascertained a number of critical issues for any emergent data archive:

- A website which can be viewed by everyone with an interest;
- A search and data retrieval system, so that the users can find relevant data and download them as quickly as possible;
- A fast Internet connection, so that the first two conditions are functional and do not just simply exist;
- Knowledge of how to create these things;
- Some level of financial support, both domestic and international;
- Well-documented and cleaned datasets.

We will try to cover all these issues, bearing in mind those two questions I mentioned earlier: How to...? and How much...?

The website: in this case, the answer is straightforward. There are a great many young people with excellent computing knowledge in Romania and probably other countries, too. A simple website can easily be created with minimal knowledge of HTML and

some Java scripts which can be found freely on the Internet. The cost differs from one country to another; we cooperated, for example, with a student who wanted some experience, and for a student any amount of money can be significant depending on the particular country. Although the website (<http://www.roda.ro>) which we created is extremely simple, this was our specific objective, so that it can be loaded on any machine, even with a very slow Internet connection. It is far from a professional site, but it nevertheless exists and functions properly. We could make it more complex in future if our Internet connection improves.

The data retrieval system: The DDI solution. As I mentioned above, each archive uses one system or another. Some systems are more efficient and some not so, but all systems come up with the same result: finding the relevant data and distributing the data to interested people. In our case, we had to choose between creating an original system or implementing one which already exists. The first option is not viable at all, because it involves huge efforts and is time consuming. We have to deal with the lack of qualified personnel, and this is the case for all institutions involved in data archiving in Eastern Europe: where can you find one or two individuals who are willing to work on creating a system for practically nothing because the salaries are so low? We have neither the time nor the money to train the personnel to create such a system, which almost certainly will be less efficient than an already existing professional system. If we can agree on this, it only remains to decide what existing system to implement.

4. Why DDI?

Because it is based on a simple logical structure, it is efficient, it is available; it does not cost anything and it is now being used or is starting to be used by all large data archives all over the world.

At first glance, the DDI structure may look complicated, but everything becomes easier and clearer with some training and personal effort. It must be emphasized here that not all the tags in the DDI structure need be filled in, only the essential ones. The rest of them are optional. Once the essential tags have been established (generally based on the Standard Study Description), the only problem is how to fill in the information to create the codebook.

There are four sections in the DDI that need to be filled with information. The first two of them (Document description and Study description) can be edited with any text editor, but we recommend using the dedicated XML editor as it is much easier. We are using Microsoft XML Notepad, a free program that can be found and downloaded from the Internet. The other two sections (Data file description and Variables description) are even easier to complete using the NSD XML Generator.

The DDI codebook is then simply published in the NESSTAR retrieval system with NESSTAR Publisher, and the user can browse the data using the NESSTAR Explorer either in the stand alone version or in the NESSTAR Light version which works in a simple web browser.

All this software is absolutely free and does not cost anything at all. However, this does not imply that the software is absolutely free: many people have put a lot of effort into creating this software and significant sums of money have been spent. If we can acquire it for nothing, this is equivalent to another method of funding.

The major difficulty that we are facing with the NESSTAR Server (and as we learned from the NESSTAR team, this situation is about to be resolved) involves the Access Control Unit (ACU), which combines a set of logical conditions in order to create user accounts with specific access levels, and certain rules to restrict access to some datasets, irrespective of the user level.

- 1. A fast Internet connection:** this is still a problem because we have not yet managed to find a cheap enough ISP which will provide a fast enough connection. From Germany, for example, one has to wait for five minutes to load my home institution's website. In Romania it's no problem, but it gets stuck in the case of international uploading. It is true that the IQLR's website uses frames and large images which take time to load; because the RODA website is so simple, we have high expectations that it'll work much faster. The only aspect which worries me is the data upload from RODA, which is equivalent to the user's download. I cannot say how much will it cost; it depends on the individual ISP.
- 2. Knowledge of how to create these things:** We have all the knowledge we needed. All the information about DDI, NESSTAR and all the software mentioned above are on the Web. Workshops and training seminars are some other very useful opportunities for us to obtain more knowledge, exchange our experiences and share our software. We can now say that we have the "know-how" to create codebooks, use software and ultimately create a data archive. However, we must admit that this knowledge is somewhat limited, at a minimum level, and we need more training as we encounter new obstacles. Specific questions on how to link NESSTAR and DDI with the web page forms need to be answered.
- 3. Some level of financial support:** this is a different story from one country to another. To date it appears that creating a data archive does not cost very much. In order to use the NESSTAR system, at least one powerful computer is needed, if not a dedicated server. We have received funding from the Ministry of Education and Research via the Information Society (INFOSOC) Project. And we also hope to obtain funding from the MOST Participation Program. However, more financial resources are likely to follow once we have proved what we can do. A powerful computer costs around \$1000; this is not so much money for an institution. The project which we submitted was successful, and funding started in February this year and will run until February next year. This is very helpful to us, but we have to search for stable financing if we want this data archive to continue in the long term.

- 4. Well-documented and cleaned datasets:** this is a problem common to all Eastern European countries. How to document the data when an enormous amount of work is required and an insufficient number of people are working? This is certainly a problem, and one of the toughest challenges we had to face. On the one hand, there were not enough people working on the data archive. On the other hand, the people who are working are also conducting some other research. Documenting and cleaning datasets are time-consuming tasks and boring for the majority of people, a fact which raises the problem of motivation. The people working in this field need to be highly motivated as otherwise they will not work at all. The most complicated job now is not how to use the specialized software, but how to get people to work. Of course, one motivating factor would be money; but money is something we all do not have. So the question is how to get work done with scarce resources?

The solution which we found is functional, but we do not claim it is universal. In our case it simply worked. In our experience, there are some human resources available, which are easy to be motivated using proper stimulants. These are the students. But why would students be motivated to do this? In the case of our Sociology Department from the University of Bucharest, students are eager to gain experience in using computers, databases and statistical techniques. Working for a data archive would represent a valuable opportunity to acquire this experience. One other reason is that they are awarded a grade for the Practical Sociology Lab. Each student is obliged to take part in this Lab, which is also their main interest. Finally, one other method which I used to attract students is a basic statistics course on Saturday. Many of my Saturdays have been spent teaching these statistics. Using our Faculty's computer lab, I shared my experience in using SPSS to carry out basic statistical analysis. It was a great success with around 25 students attending each Saturday. It is these students who clean and document the data. They get what they want, i.e. more statistical knowledge and a grade, and we get what we want, i.e. well-cleaned and documented datasets. At the time of writing of this report, the number of students wanting to attend the group is increasing.

We have now managed to finish about 30 to 35 NESSTAR compliant codebooks, and the others are in progress.

We received excellent support from the Faculty of Sociology and Social Work: using a computer lab in one of the Faculty's buildings, we can work together with the students in preparing the datasets for archiving. With 10 networked computers at our disposal, we achieved good results in a reasonable amount of time. All the other expenses are covered by the Faculty as well.

The latest good news in our close relationship with the Faculty is that we have a new funding source for the data archive, which came about through one of the Faculty's projects. Our next aims are to be accepted in the Council of European Data Archives (CESSDA) and the International Federation of Data Organizations (IFDO), and to implement the LIMBER (Language Independent Metadata Browsing of European Resources) Thesaurus in our data archive. To date we have only worked with a self-designed thesaurus; LIMBER is the future.

Experience with the Data Documentation Initiative Codebook Standard in ADP, Slovenia

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1. Introduction

The purpose of this paper is to review practical usage and experiences with a new data documentation standard which is commonly used by other social science data archives. The technological development of this standard has had a major influence on the nature and set-up of the Slovenian Data Archives (ADP). We can draw a parallel in this respect with the situation in the 1960s when the first national data archives were established under the influence of technological innovations. This was the period when the first initiatives for establishing common standards started. The lack of persistent coordination efforts resulted in a sloppy use of standards and non-compatible catalogues at the start of the Internet. This encouraged data archive organizations to formulate the standard based on new technology and after taking account of all previous problems. The new DDI Standard (Data Documentation Initiative) was written in XML Internet Language. The DDI Standard was exactly the model which the Slovenian Data Archives were looking for. We took part in the beta test and adopted the DDI as our internal format for organizing metadata. After four years of experience in using DDI, the first results began to emerge. To follow up, I will mention both the advantages and disadvantages of this emerging standard. After a brief examination of the DDI DTD (Document Type Definition) document structure, I will provide a detailed description of the actual flow of information based on DDI in our archive, the so-called **DDI XML Codebook production line**. And finally, I will introduce the NESSTAR Catalogue as a tool which is based on the DDI standard and is available free of charge to members of CESSDA (Council of European Social Science Data Archives).

2. A brief history of data archive technical standards

Social science data archives have the task of storing raw data and instigating secondary analysis. Their development is greatly influenced by technological developments and technical standards in the particular period (1). The idea of a data archive arose in the late 1950s with the need to store IBM punch cards. In the 1960s, however, computers and new storage media came on the scene and that also spelled the end of storage standards. Data conversion and exchange became key tasks of data archives at that time. They matured as organizations which possessed know-how on various storage formats. One advantage for users was that data archives were capable of providing them with raw data according to the format which users required.

In the early 1990s at the start of the Internet, history repeated itself with some minor alterations. This time the problem was no longer the lack of compatibility between data storage standards as such, but rather the incompatibility between different metadata languages and formats, and thus incompatibilities between catalogues and codebooks produced by different organizations around the world. The CESSDA electronic codebook specification was an early attempt to overcome this problem. The next attempt was the OSIRIS Codebook Dictionary. For a long time this was a working model of a common standard for describing variables. Another one, a Standard Study Description scheme, provided data archives with at least some guidelines on what information to include in a catalogue of their data holdings. However, a lack of coordination resulted in non-compatible catalogues (2).

3. Situation in 1997 when ADP was established

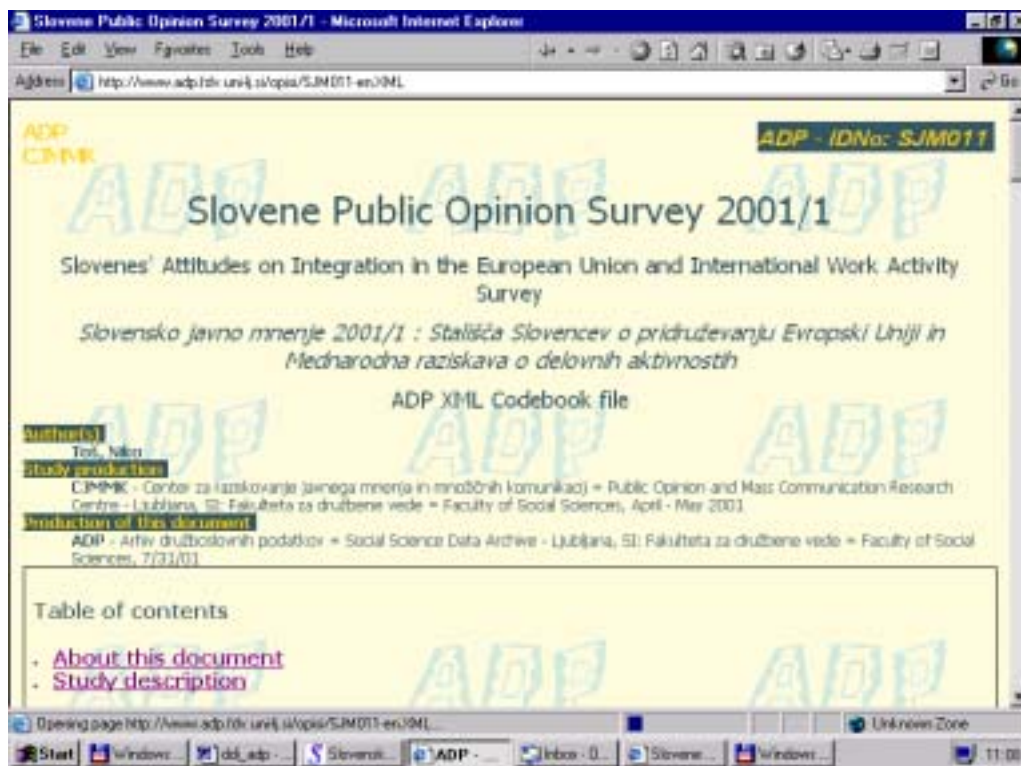
The situation in 1997 when ADP was established is neatly captured in the following evaluation: “Multiplicity of classificatory languages, search techniques and standards for documenting data” (2). Every organization adopted its own dialect of existing standards. Creativeness inside local boundaries resulted in many products which were adapted to local needs and were almost impossible to transfer to other locations. The CESSDA Integrated Data Catalogue (<http://dasun3.essex.ac.uk/Cessda/IDC/>) was a solitary example of still existing integration efforts in the 1990s.

When the founder of the first European data archive wrote a historical overview describing support for an established data archive compared with a new one, he talked about a “Midwife function”(3). The role of Central Archive (ZA) in the late 1960s, when five new archives were established in Europe, was to offer to “share experiences, especially as regards past errors” and provide “technical information on data storage and retrieval”. Using the Internet, new archives in the 1990s were able to see that technical information on cataloguing and codebook production was almost totally unreliable. We were in a twilight zone. We either had to invent our own technical solution and start from scratch or wait and look for a new and better standard which promises to overcome the problems of non-compatibility between different national archives and opens up possibilities for real cooperation.

At that time, however, DDI was already being discussed. In March 1999 the DDI beta version became operable. Beta testing of the DDI DTD was conducted between March and August 1999. The test was funded through a grant from the U.S. National Science Foundation. ADP applied for a grant, which secured six months of intensive theory and practice regarding the production of its own XML codebooks. The results of the beta test led to the successful implementation of the first ten XML codebooks. A production line for routine codebook production was enhanced. At the end of the beta test, we began to prepare our own program in XSL (Extended Style Language) for XML Codebook presentation on the Internet. This enables our users to browse codebooks

prepared using the DDI beta test version. In March 2000 the slightly improved DDI DTD Version 1.0 was published incorporating suggestions from the beta test. Immediately after that we converted DDI DTD Beta XML Codebooks into the 1.0 version using a special script. Our main emphasis as a new archive was to continue producing XML Codebooks, in order to fill our collections with the most important datasets from Slovenia from the past and present.

Figure 1: An opening screen of a DDI DTD Codebook document in the ADP List of studies (<http://www.adp.fdv.uni-lj.si/opisi/SJM011.XML>)



Meanwhile, the NESSTAR tool was being refined in parallel, a fact which promised to add functionality to a growing collection of XML Codebooks. And finally at the end of 2001, an ADP NESSTAR server catalogue was successfully configured. NESSTAR now makes a collection of over 100 Codebooks in DDI XML fully operable. It facilitates searches across Codebooks in a collection as well as simultaneous searches across different collections in different sites. It also serves as an interface for simple data analysis, enables data files to be downloaded and permits controlled access to specific datasets for our users.

4. Basic consideration when choosing a DDI DTD as a standard for Codebook production

There are some advantages and disadvantages in using an existing standard. The DDI DTD is like any other standard when faced with pressure to revise and add new features. It is still an emerging standard. Some of the main data producers, software producers and data archives are still considering whether to use it. One obvious **advantage** from our point of view is that there is no need to (re)invent local catalogue rules. Use of the standard makes it possible to cooperate in document production. A properly described DDI DTD Codebook document on an international study, which was prepared in one archive, can be shared between all sites that possess the data for the same study. The adoption of a standard makes it possible to use existing and prototype software tools suitable for the standard environment. A virtual catalogue of different sites, all using the same standard for study description, is manageable. Users can therefore use just one entry when searching for data. There is a growing list of conversion tools from SPSS and CAI software files, which are made available to users of the same standard.

There are also some **drawbacks**. There is a danger of being isolated if other bodies do not adopt the same standard. This is what happened with the above-mentioned CSSDA electronic codebook specification in the 1960s. There is of course less potential to add specific emphasis according to local needs. When you are using a standard, the inventive initiative has to be slowed down to concentrate more on efforts aimed at adding value to existing information stored in a standard structure. By their very nature, revisions of a standard must be slow and agreed by a community of users, while bearing in mind the compatibility of previous versions of the same standard. When a revision is accepted, cooperative efforts preparing tools for a transfer to a new version move quickly. There is a danger of dependency on someone else's timetable in the dynamics of tool production. For example, NESSTAR was late in fully adopting the UTF-8 Convention, which was crucial to us. This was the reason why we waited another year before configuring our own NESSTAR server.

5. Basic features of XML and DDI DTD

What is XML? It is a special computer language for storing various types of information in a structured way. It is especially practical for environments where documents of the same type are produced. It possesses the quality of an ordered information system such as a database, while retaining the flexible feature of almost free-text authoring of the documents. In short, "XML is to a document's intellectual content what HTML is to the physical structure of that document" (4). XML becomes an option, especially in environments where there are many specialists for their specific content area and who are required to complete information. One reason is that XML can be used without

professional knowledge of computer engineering. Different authors can contribute to it - each with specialist knowledge of its subject area. All obey the same content structure. It is therefore user-friendly. When an XML document is finished, it is already prepared for multiple format presentations, e.g. a printed book, Internet, etc.

DTD is a generic term for document type definition. DDI DTD in this respect means a special Data Documentation Initiative XML Codebook Document Type Definition (DTD). The XML document must be “*well-formed*” and “*valid*”. These are the only requirements which a user of a specific DTD must satisfy when writing a document.

Well-formed means that a document must follow the XML syntax. The main features are:

- `<tags>` must be closed `</tags>`
- Sensitive “UPPER–lower” case naming
- Only one `<tag-name ID=“id-entry”>` per document

Any XML document, e.g. HTML, can be well-formed.

A valid document also conforms to a specific DTD. The specific DTD to which a particular document conforms is shown in a DOCTYPE declaration. This is illustrated by the underlined path call in the following example:

```
<!DOCTYPE codeBook SYSTEM “CONFIG10/CODEBOOK.DTD”>
<codeBook>
<docDscr> (...)
```

When authoring a new document, there is no need to look at the “machine-readable” “codebook.DTD” file. An XML editor helps to check well-formedness and document validity. It helps to choose appropriate elements in accordance with the DTD while editing a document. A “human-readable” Tag Library, which consists of element definition with practical examples, gives you guidance on the type and form of information that you need. Let us now take a quick look inside the DDI DTD document structure. A DDI Codebook document integrates different levels of information in the same document. There are five main levels of information:

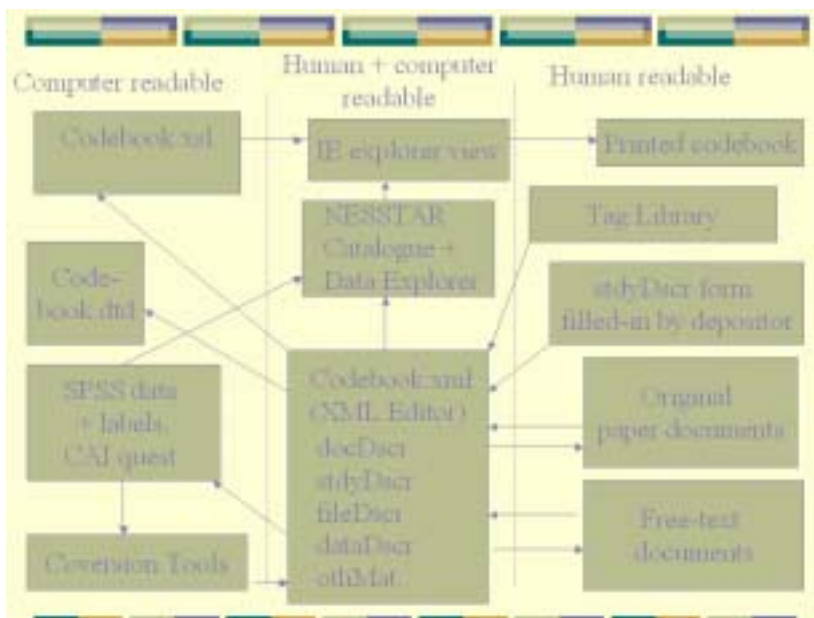
- docDscr (XML document itself and its sources description)
- stdyDscr (overall study and study level references)
- fileDscr (physical data files)
- dataDscr (variables)
- othMat (additional material for variables documentation)

A DDI XML Codebook specifies the catalogue contents which are suitable for input to virtual catalogues in different sites, which are produced on various platforms. Secondly, it specifies codebook contents (variables description) which are suitable for input to the “virtual library of all individual measurements in the studies in a collection” (2).

1990 Scheuch talked about the dilemma of a library concept versus a data service concept, with a strong preference for the latter (3). In the first approach a unit of storage is “study”, while in the second emphasis is placed on the variable as the primary unit of storage. The beauty of a DDI XML Codebook is that it encompasses both in an integrated way. It is flexible enough to allow for individual styles in approaches to the description of material in a data archive. It is adaptable to specific needs of a data archive. We can choose to put special emphasis on a study or a variable level inside the same collection according to the nature or importance of a specific dataset. In a DDI DTD XML codebook you can integrate meta-information about the intellectual contents of a study, its scope, methodological details, retrieval and dissemination policies, file location and format, i.e. very important information for users of any data archives. It also includes references to accompanying documents, e.g. reports on methodology, publications, classification lists, questionnaires and similar, computer syntax files, tables of results, etc. It can include cross-references inside and outside a document, which can function as hyperlinks in the WWW. You can achieve this by using ID, IDRefs and URI attributes defined in a DDI DTD.

To sum up, XML is similar to HTML and is easy to use, fairly flexible, broadly accessible and hyper-textual. It also has a computer and human readable as well as comprehensible structure of document contents.

Figure 2: DDI XML Codebook production line in ADP



6. The DDI XML Codebook production line in ADP

During the routine **production of codebooks** you can use templates and entities which are repeated across documents to economize a production line.

The **first** step towards acquiring a new dataset involves entering basic information on the new dataset file, the depositor and accompanying material in the ADP Inventory book (ACCESS Database). After choosing the most suitable predefined XML DDI Codebook template (e.g. one from a previous study in a series), we extract the information from a database to the draft XML Codebook. The resulting Codebook is transferred to an Internet catalogue to obtain quick information on the new study. Viewing is supported by referenced XSL using a standard Internet browser.

In the **second** step a full study description section is produced. A depositor is requested to complete a MS Word form, containing elements corresponding to the DDI DTD study description section. A draft XML Codebook from the previous step is edited using the XMetaL® XML editor. Missing pieces of information are added manually by typing them in or by using the “drag and drop” facility.

The **third** step sees the addition of a codebook data description section which is generated from the SPSS data file. The SPSS data file, which includes variables and value labels, is converted using the free software NSD XML Generator® to an XML data description section of the DDI Codebook and is integrated in the previous study description (5).

In the **fourth** step, but only for the most important datasets, full question text is entered in the codebook data description section. We used macros to avoid repeating the process. This task is still the most labor-intensive part of codebook production. If a CAI (Computer Assisted Interviewing) computer readable file is available, we use a conversion tool to change from the CAI format to the DDI XML format. Two documents, i.e. Slovene and English language DDI XML Codebooks, are finally converted into a NESSTAR complaint format. They are published in a NESSTAR catalogue along with the data file. Users can search through datasets and catalogues, perform some simple online analysis of data and download files.

Figure 2 shows how these steps are integrated around the final DDI XML Codebook. DDI XML Codebook documents form the center of a “knowledge” production and dissemination system. All the information and material connected to one specific study are integrated in an XML codebook. This opens up possibilities of further restructuring of this information across codebooks.

7. Conclusions

Issues relating to the DDI XML Codebook production line must be taken into consideration when writing one's own DDI Codebook. XML editors sometimes lack UNICODE support, which presents a problem to all non-western countries. The use of entities in XML documents helps to standardize document production and makes it faster and easier to translate into English. According to our experience, it is more natural to have two separate documents for a Slovenian and an English language codebook, even when some of the information can be entered in the same document and then distinguished by the use of *xml: lang* attribute.

DDI DTD is attracting increasing attention in a community, a fact which will ensure the production of new tools for enhancing its use. Despite continuing developments and overlapping archive standards, DDI 1.0 is state-of-the-art technology which promises to ensure the longevity of XML Codebook 1.0 documents. The ADP in Slovenia has used its experience of DDI to manage its organization when it was the only one commonly available.

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TARKI Databank¹

Ildiko Nagy, Social Research Informatics Center (TARKI), Hungary

Institutional settings

The Social Research Informatics Center (Társadalomkutató Intézet, TARKI) was established by the Consortium of different academic and research institutes in 1985. The Databank was set up within TARKI with the aim to create a service-providing center, that serves the establishment of the information basis of the Hungarian social research. In order to contribute to the improvement of empirical social research TARKI also offers consultancy service and conducts surveys. Since 1992 it has a special Survey Department. In 1998 the TARKI Incorporation was founded for conducting profit oriented opinion polls, while the TARKI Consortium continues the non-profit data archiving.

At present, there are 9 member institutions of TARKI, which are the following:

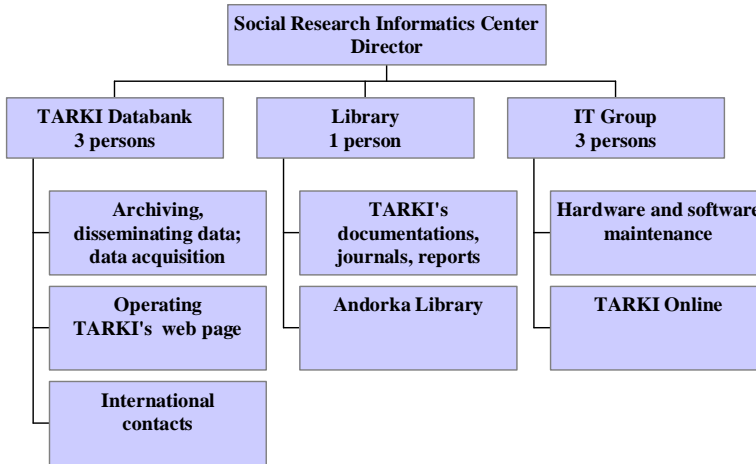
- Eötvös Lorand University of Sciences,
- University of Szeged;
- University of Debrecen;
- Hungarian Central Statistical Office,
- Budapest University of Economic Studies,
- Institute of Political Sciences of the Hungarian Academy of Sciences;
- The Sociological Research Institute of the Hungarian Academy of Sciences;
- National Institute of Vocational Training;
- High School of Nyíregyháza.

Data collections

The Databank has been functioning since 15 years and its main task is to archive and disseminate data and survey documentation, and the acquisition of data from other research institutions as well. At present the Databank contains more than 450, mostly Hungarian related, empirical social data sets in SPSS format, suitable for secondary analysis. These data are mostly originated from nationwide representative sample surveys. The archived surveys are conducted by TARKI and by other Hungarian research institutes as well. In the Databank there are also some data sets, which are suitable for international comparison. The users of the Databank can choose from various kinds of

topics, such as attitudes, family, social deviance, health care, life-styles, values, consumer patterns, occupations, mobility, ethnic and migrant groups, local governments, stratification, poverty, social policy, social relations, social strata, rural society, religion, elections etc.

Figure 1: Structure and staff of TARKI Consortium



Data access

There are the following data access categories:

- Free access and dissemination
- Free access for Hungarian researchers and research institutes, for others with the owner's permission only.
- Free access for the Member institutions of TARKI, for others with the owner's permission only.
- Access with the owner's permission only (for max. 5 years)

Data access fee

The Databank also sells data. The price of the data set depends on whether it is simple or aggregate, on the date the survey was conducted and on the status of the purchaser. The current price list of the Databank is the following:

Table 1: Price list of the TARKI Databank June 2001 (in USD)

	Simple dataset	Aggregate dataset
Survey conducted 0-12 months before	250	1000
Survey conducted 13-48 months before	166	666
Survey conducted 49 months before	84	333
Discount category I Foreign research institutes Hungarian public corporations	66% of the list price	
Discount category II Hungarian non-member research institutions Foreign students	33% of the list price	
Discount category III Member institutions of TARKI Hungarian students International research institutions according to data exchange agreement	Free	

Thematic databanks

The Databank operates different thematic databank sections. The aim of creating these thematic sections is to collect and organize those data sets which are relevant for the same topic. One of the thematic sections is the Historical Archive, which was built jointly with the Hajnal Istvan Kör (HIK), at present it includes 23 economic and social-historical databases. (http://www.tarki.hu/t_adat/index.html)

The Women's Data Archive was established in 2000. It sums up social science research projects concerning women and gender issues and thus makes data and publications, a register of researchers and web sites easily accessible.

(<http://www.tarki.hu/adatbank-h/nok/index.html>)

The TARKI Databank operates the New Democracies web site, which provides online access to the questions and answers from the multinational New Democracies Barometer database. (<http://rs2.tarki.hu:90/ndb-html/>)

The Databank also publishes and distributes the CD-ROM version of the Hungarian Household Panel surveys conducted between 1992 and 1997.

International cooperation

Since its establishment, TARKI has been laying emphasis on maintaining close relationship with the major significant social science data archives of the world. At present it is a member of three international data organizations: IFDO (International Federation of Data Organizations), CESSDA (Council of European Social Science Data Archives), ICPSR (Inter-university Consortium for Political and Social Research), ECPR (European Consortium for Political Research). This membership, due to free exchange of data sets between the member institutions, gives the TARKI Databank an opportunity to make international databases available for Hungarian users.

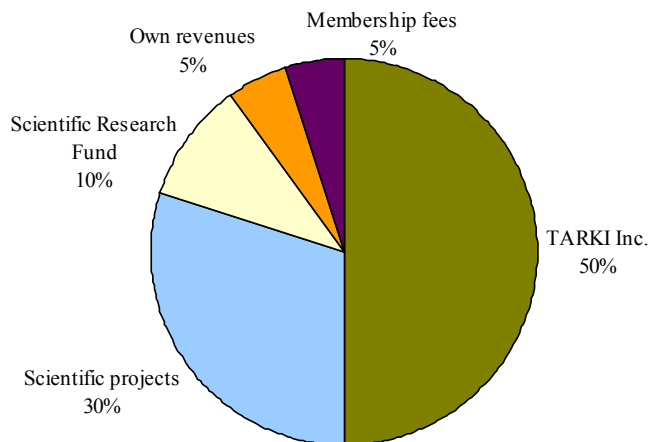
The Databank also joined the Luxembourg Income Study project and the European Household Panel Network of CEPS/INSTEAD in Luxembourg, and therefore it gives free access to LIS databases for Hungarian researchers. Additionally these project leading institutions offer scholarships for researchers interested in international income comparison.

Since 1988 TARKI has been taking part in the International Social Survey Programme, as a result TARKI Databank is able to offer access to all related international data sets for Hungarian users. Further international data sets are the East European comparative surveys, which are conducted by the Central European Opinion Research Group (CEORG). CEORG is a research foundation consisting of TARKI, a Czech (Centrum pro výzkum veřejného mínění, CVVM), and a Polish research institution (Centrum Badania Opinii Społecznej, CBOS). It was founded in 1999 and is situated in Brussels.

Funding situation

A significant part of the revenues of the TARKI Databank comes from the support of the TARKI Inc. and scientific projects (see Figure 3).

Figure 2: Revenues of the Databank – Plan for 2001

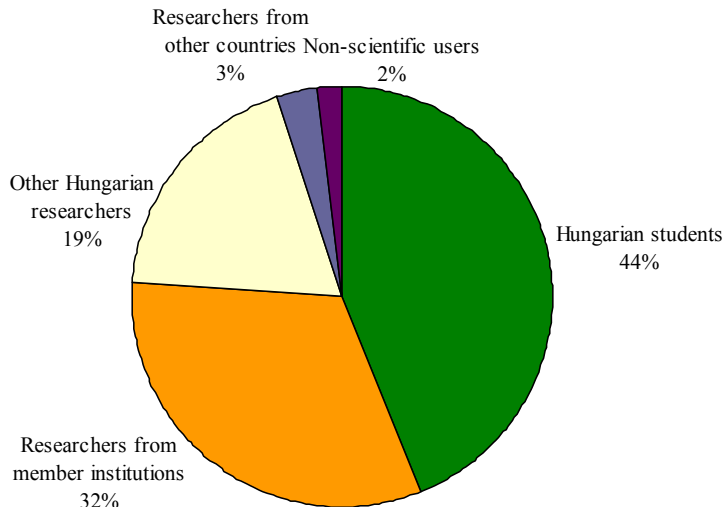


Since 2001 the Hungarian Scientific Research Fund has been one of the main supporters of the Databank. The membership fees of the TARKI member institutions and the data access fees altogether make up only 10% of the annual revenues. The total revenues for 2001 are about 58.000 EURO

The users of the Databank

The Hungarian social researchers and students of higher education are the main users of the TARKI Databank (see figure 3).

Figure 3: Users of TARKI Databank in 2000



Future plans and problems

The TARKI Databank participates in international social science database projects such as the Consortium for Household Panel Studies for European Socio-economic Research (CHER) financed by the European Commission. This project lasts 3 years (2000-2002) and aims at harmonizing several national panel studies with the European Community Household Panel.

TARKI's thematic data bases the Historical Data Archive and the Women's Data Archive – will be updated in the near future.

Although the TARKI Databank is a public archive it is not supported by the government. The funding of the Databank is one of the main problems.

Note:

- 1 Paper presented at the IASSIST/IFDO Conference 2001. In: B. Hausstein and P. de Guchteneire (eds.), *Social Science Data Archives in Eastern Europe*. Papers presented at the "New Archives Forum", IASSIST/IFDO Conference "A Data Odyssey – Collaborative working in the Social Science Cyberspace", Amsterdam, 14-19 May 2001. Berlin, Cologne 2001. [http://www.gesis.org/en/data_service/eastern_europe/news/NAF2001.pdf]

Final Remarks

The idea of data archives took about 20 years to be implemented in western Europe. When the first European Social Science Data Archives were founded in the sixties, the infrastructure for social research was weak. It took a while to convince the scientific communities of the advantages of sharing data and using it for secondary analysis.

As regards Eastern Europe on the one hand we are facing similar problems as the papers in this volume are showing, but on the other hand there are completely new preconditions for setting up a data archive. New technologies and the World Wide Web have opened up undreamed-of possibilities for creating a data archive.

Additionally, the new archives can take advantage of the experience and support of the well established western data archives. The main challenge for data archive specialists in Eastern Europe is to benefit from it under the national conditions.

Old and new archives are facing the chronic lack of financial support. To deal with this problem it is necessary to create special networks and experts groups to concentrate the efforts in the field of the development of archive tools and meta data production. Sharing experiences and tasks are the request of these networks. The international data organizations have been providing an appropriate framework for these projects for a long time.

Whereas in 1990 TARKI in Hungary was the only functioning data archive in Eastern Europe now there are already 9 data archives and 5 data archive initiatives. It took only about 10 years to build up the basis for a national infrastructure in more than 10 countries. But there are still needs for close cooperation of the data archives in Eastern Europe. The workshop “Social Science Data Archives in Eastern Europe – Results, Potentials and Prospects of the Archival Development” in 2002 has been one step in this direction. It has provided an overview of the data infrastructure in Eastern Europe, and the creation of East European Data Archive Network (EDAN) is ensuring lasting positive impacts on further archival development within Eastern European countries.

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