Long-term data for Europe

EURHISFIRM

Data and sources inventory and documentation (WP4)

Johan POUKENS (University of Antwerp)
Position of WP4 within the project
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<th>Deadlines</th>
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<td>Information system and documentation standards</td>
<td>June 2018</td>
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<tr>
<td>4.2</td>
<td>Data and sources inventory</td>
<td>Report on the inventory of data and sources</td>
<td>December 2018</td>
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<td>4.3</td>
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</table>
4.1 Information system and data documentation standards

4.2 Data and sources inventory

4.3 Data and sources semantics

4.4 Data and sources documentation and quality assessment

4.5 EURHISFIRM documentation standard

Relationships between WP4 tasks
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4.1 Information system and data documentation standards

Data and sources inventory and documentation (WP4)
Metadata standards
- Dublin Core
- DataCite
- Da|ra
- Data Documentation Initiative (DDI)
  - DDI Codebook (DDI 2.5)
  - DDI Lifecycle (DDI 3.2)

Information systems
- Harvard Dataverse
- NESTAR Publisher
- Colectica Designer
4.2 Data and sources inventory
Availability of printed sources (D4.2)
Examples of government publications from Germany
Examples of stock exchange official lists from Belgium
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Availability of printed sources

Yearbooks: 1875/1900-2010
Price lists: 1800/1850-2000
Government publications: 1815-2000
This project has received funding from the European Union's Horizon 2020 Research and Innovation Programme under grant agreement N° 777489.

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Examples of yearbooks from the United Kingdom
Examples of databases and historical studies (company histories)

London Stock Exchange
Investor’s Monthly Manual – Stocks Data

Beginning January

Ending December

Search Type

By Security Number
By Partial Company Name
By Exact Company Name

ICPSR Find & Analyze Data

RUSCROP: A Database of Corporations in the Russian Empire, 1700-1914 (ICPSR 9142)
Version Date: Jan 12, 2004
Principal Investigators: Unknown

https://doi.org/10.3886/ICPSR09142.v3

Three centuries of Belgian stock exchange data

London Stock Exchange

Revue Belge de Philologie et d'Histoire

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Examples of databases and historical studies (company histories)
4.3 Data and sources semantics
Les Grandes Brasseries du Hainaut

Siège social : Bruxelles, 156, quai de Mariemont.

MM. Ant.-Alb. De Poorter, Jemappes, Président.
Albert Paulet, Mons, Administrateur.
Arn. d’Udekem d’Acoz,
Baron F.-X. Cogels, Harmignies,
G. Gautier de Rasse, Bruxelles,

MM. Henri Paquier, Bruxelles, Administrateur.
Baron Alf. Osy, Anvers, Commissaire.
Jos. Moreau, avocat, Mons,
Léon Requier, Bruxelles,

Example: Different meaning of “Commissarissen” in Belgium and the Netherlands

Recueil financier
(Belgium)

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Van Oss’
Effectenboek
(Netherlands)

NV KONINKLIJKE DISTILLEERDERIJEN ERVEN LUCAS BOLS, statutair gevestigd te Amsterdam.

Commissarissen: H.J. de Koster (voorzitter), drs A.W.J. Caron, mr J.R. Carp, prof mr P. Sanders en mr W.A. Steenstra Toussaint.
Externe accountants: Morel & Limperg, Amsterdam.
Publikatie jaarverslag: april.
<table>
<thead>
<tr>
<th>1</th>
<th>Identification of companies</th>
<th>3</th>
<th>Capital, debt and securities</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.1</td>
<td>Company name</td>
<td>3.1</td>
<td>Share capital</td>
</tr>
<tr>
<td>1.2</td>
<td>Legal form</td>
<td>3.1.1</td>
<td>Authorised capital</td>
</tr>
<tr>
<td>1.3</td>
<td>Start date (incorporation)</td>
<td>3.1.2</td>
<td>Issued capital</td>
</tr>
<tr>
<td>1.4</td>
<td>End date (liquidation)</td>
<td>3.1.3</td>
<td>Paid-up capital</td>
</tr>
<tr>
<td>1.4.1</td>
<td>Voluntary liquidation</td>
<td>3.2</td>
<td>Number of shares</td>
</tr>
<tr>
<td>1.4.2</td>
<td>Compulsory liquidation</td>
<td>3.3</td>
<td>Nominal value of shares</td>
</tr>
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<td>Registered office</td>
<td>3.4</td>
<td>Classification of shares</td>
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<td>1.6</td>
<td>Identification codes</td>
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<td>Bonds</td>
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<tr>
<td>1.7</td>
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<td>Market price of securities</td>
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<td>General assembly of shareholders</td>
<td>3.9</td>
<td>Identification codes</td>
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<td>2.2</td>
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<td></td>
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<td>Annual accounts (financial statements)</td>
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<td>4.3</td>
<td>Profit allocation</td>
</tr>
</tbody>
</table>
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4.4 Data and sources documentation production
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Documentation of series (bibliographic metadata) in Colectica Designer (examples from Spain)
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Same metadata in DDI-XML format...

The Boletín de cotización is the official price list of the Madrid Stock Exchange (Spanish: Bolsa de Madrid). Initially, it included daily spot prices...
Abstract

The Boletín de cotización is the official price list of the Madrid Stock Exchange (Spanish: Bolsa de Madrid). Initially, it included daily spot prices of public bonds and corporate shares and debentures and forward prices (first or opening, highest, lowest and last or closing price only) of some public bonds, their nominal value and the amount paid-up on shares. Details on the previous price (date and quote in percentages) and on dividends and interests were added in 1905. The dividends paid during the previous and the current year were reported for shares and the interest rate and the date when the next interest payment was due for bonds. The total share capital in circulation, bid and ask prices and the annual highest and lowest price were added during the interwar period (1934 at the latest). Publication was interrupted multiple times, especially during the Spanish Civil War when no official lists were published between 17 July 1936 and 4 March 1940.


Publisher: Madrid : Colegio de Agentes de Cambio (1854-1980) ; Sociedad Rectora Bolsa de Valores de Madrid (1999-2002)

Publication date: 3/13/1854 12:00:00 AM

Copyright: Partially in the public domain

EndDate
2002-04-30
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Documentation of variables in Colectica (examples from Spain)

<table>
<thead>
<tr>
<th>Name</th>
<th>Cambios publicados</th>
</tr>
</thead>
<tbody>
<tr>
<td>Label</td>
<td>Prices at which debentures were subsequently traded</td>
</tr>
<tr>
<td>Description</td>
<td>Prices are reported either as a percentage of their nominal value or in peseta per unit. In the former case, the amount is followed by a percentage-symbol (%); in the later case by the abbreviation pt. or pta.</td>
</tr>
</tbody>
</table>
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4.5 EURHISFIRM documentation standard

Data and sources inventory and documentation (WP4)
Make use of existing standards:
- DDI 3.2 or, alternatively, Dublin Core or MARC for citation-level (bibliographic) metadata
- DDI 3.2 for variable-level metadata
Data and sources inventory and documentation (WP4)

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Thank you for your attention