# Philatelic Research – A Basic Guide

[An article first published in 2008. This third version revised 2019]

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For those at the beginning of a philatelic research project it will be of much value to them and the results of that research, to have a systematic approach. This article attempts to set out some basic concepts that will help the researcher. This set of guidelines should not restrict the author's vision or concept of work, but should help him or her attain a satisfactory result of value to others and posterity.

## 1. Define your subject.

1.1 Decide the subject matter and parameters of your research. Examples of this include: country, territory, dates, reign; is it postage stamps, postal stationery, meter stamps, revenue stamps or postal history materials, philatelic history: of what, or where, during which period; including postage rates, postal routes, postmarks, theme or topic, etc? Deciding what is not to be included might be a useful discipline. Beware 'project creep' where your subject expands beyond the original definition to the point where it becomes unmanageable. Such expansion may be interesting but not necessarily wholly relevant.

1.2 Write down the subject as you have decided; it will be a useful discipline, but it should be flexible as the availability of research materials may change the course of, or extend, the research.

1.3 Decide on the level and extent of the research work when published; serious, serious detailed, introductory, light hearted, etc., if necessary tailored to where it may be published. Consider who the intended audience may be.

1.4 Consider the treatment that you have in mind for your subject. For example, a postal history work might include, in addition to the postal matters, text giving the social, political or economic background. Such treatment may give a more rounded work with increased credibility.

1.5 Check that it or something close, has not been done before (see 2 below), or that somebody else is not currently working on it too. A new work at a different level or with a different emphasis, to one already existing, is invariably good; history of any subject is always being reinterpreted.

1.6 If appropriate read background texts to your subject so that your understanding and the context of your work may be better understood.

## 2. Check the literature

2.1 Find all, or as much as possible, of the literature and documents on your subject. This will take the form of books or monographs, articles in periodicals or serials, auction catalogues, stamp catalogues, bibliographies, indexes to periodicals, grey literature (semi published), digital, internet web-pages and archival files, etc. See 2.3

The Global Philatelic Library (managed by The Royal Philatelic Society London) is a major online website for philatelic research. It is an international Union Catalogue of many philatelic libraries. It includes various significant research works by Brian Birch, for example his *Bibliography of Philatelic Periodicals* (1,010 pages in 2018), his *Biographies of Philatelists and Dealers* (3,331 pages in 2018), and his *The Philatelic Bibliophile's Companion* (1,367 pages in 2018). The Global Philatelic Library is also home to the digital texts (some 600,000 pages in 2018), which are out of copyright, from the Crawford Library (1861 to circa 1913) held at the British Library, London. *Catalogue of the Crawford Library of Philatelic Literature at the British Library* (1991) is included as is *The Crawford Library of Philatelic Literature at the British Library and for the World in Digital Form* which gives its definitive history and context.

*The David Straight Memorial Philatelic Union Catalog* is hosted online by the American Philatelic Research Library for 14 mainly United States philatelic libraries. It lists books and to some extent periodical articles and grey literature and so is of much research value.

The valuable website *Timeline of Philatelic Literature, 1830-1875* to be found at: http://www.cse.psu.edu/~deh25/post/Timeline.html contains data about printed books, catalogues, periodicals and articles etc. with many internet links to digital texts. Compiled by Don Heller in the United States of America. Latest version dated 15th May 2019.

A number of unpublished card indexes are held by philatelic libraries, examples of these include the Piper and Vooys indexes held at the American Philatelic Research Library, and the Muller index at the Munich Philatelic Library - Die Philatelistische Bibliothek in München.

In the United Kingdom *Copac* is a Union Catalogue of over 100 major UK and Irish libraries. These includes the UK's five legal deposit and national libraries (including the British Library), many University libraries, and specialist research libraries.

2.2 Books or monographs are found in a library catalogue, or philatelic bibliography (for example *New Zealand and Dependencies – A Philatelic*

*Bibliography*, 288 pages, 2004). A library catalogue lists what will be in a particular library while a bibliography will attempt to list all literature for a subject area, so do check both. Those which are available on the internet and are usually keyword searchable are of particular value. General philatelic reference works may have important information, for example [de Worms] *Perkins, Bacon Records…*, and Williams, *Fundamentals of Philately*. Grey literature is semi published text. This will include conference papers, meeting notes, unpublished limited circulation material, etc. and is usually treated in library catalogues and bibliographies as published materials.

2.3 Articles in periodicals are probably the most difficult to find. Research of periodicals should also be guided by tools in 2.2. Periodicals might be of a general nature for example *Stamp Lover* or specialised like *Irish Philately*. Many may have less than helpful titles if you do not know the subject matter, e.g. *Upland Goose* (Falkland Islands) or *Maple Leaves* (Canada). Those with annual or cumulative indexes, if well-constructed, offer the most help. *The Standard Index to Philatelic Literature 1879-1925…* by Albert H Harris [a reprint with additional information was published in 1991 as *The Harris Index to Philatelic Literature 1879-1925…*], is good example. *The London Philatelist*, the journal of The Royal Philatelic Society London, has a key word searchable "Archival Edition" which is available to Fellows and Members of the Society covering all of its volumes from 1892.

2.4 Auction catalogues, including specialised sales, may be difficult to discover if not listed in some way in a library catalogue or bibliography, etc.

2.5 Bibliographies or references in books or articles will be useful source of subject literature data. The more bibliographic data you find the easier it becomes to complete the process.

2.6 Archival files will contain original and probably definitive information. Such files probably are based on a correspondence of some kind, so other files may exist to reflect the other side of that correspondence (post office, printer, papermaker, designer, etc.). Most actions have a financial consequence, so a financial file from perhaps a treasury department may be useful, perhaps in establishing an operational model. Associated documents/files may contain the information that you are seeking and so should be inspected. Archival files will be kept in a country's national/local archives/library, a post office, the Universal Postal Union (UPU), a printer, paper maker, taxing authority, etc. Think widely. It is extremely important to record file names, reference numbers or references, etc. If your project is a long term one you may need to return to the files after a length of time and in any event the details of the files will be required for the vital references. See: 4.2

2.7 Non-philatelic materials will give background and other useful information, and these include: general directories, trade or professional directories, Government or official publications, maps, newspapers, patents, timetables, biographies, Army and Navy lists, etc.

2.8 Make a list of the books, and the periodical titles with volume, page and date, etc, as well as we-site details, and details of files, etc. See 4.4

2.9 Read or at least examine those sections of books relevant and the same for periodicals, auction catalogues etc. It will be helpful to do this in the order published; that is by date order. This will give an idea of the development of the subject and its history. Periodicals should be listed as in 4.4 below, with a note indicating usefulness. This may serve as a bibliography or select bibliography in the finished written work, and will be invaluable in recording texts to be revisited.

2.10 When conducting searches on the internet, keep references/web-addresses and try to verify the information with primary sources. Remember that web pages are unlikely to be available for as long as a printed item. It might be wise to print or archive them, or parts of them. If used as references, state the date on which they were accessed.

2.11 While web searches of such as Wikipedia and Google are usually useful, do not automatically believe everything that you find, or understand the context in which it is given. This comment may apply to printed materials too. Some researchers have not been accurate, or have a good interpretation or perspective. This may be difficult to judge in the first instance but experience gained by your research will help given time. An indication as to the research quality of any text may be if the text does not include references and or a bibliography. Always refer to the primary source of information where possible, these will or should be accurate but are unlikely to give contextual information. Check information.

## 3. Examine philatelic material and discuss the research project with knowledgeable people.

3.1 Examine as much material as may be available in private and public collections (museums, libraries and archives). Think widely as to where material may be held. It is to be expected that a nation's postal museum (it may be called a museum of communication) will specialise in the material of that country, but it may hold collections of other countries; for example, the Museum of Communication, Berne, Switzerland holds an important collection of United States material, the Charles A Hirzel Collection. The Museum of Communication, in The Hague, the Netherlands holds some archival material being proof copies of the postage stamps, printed by the printing firm Enschede, for the Transvaal Second Republic 1881 to 1899.

A few of the world's philatelic repositories contain many collections or archives covering a number of territories or disciplines; one is the British Library, Philatelic Collections, in London, UK, another is the Smithsonian National Postal Museum, in Washington DC, USA and the third is The Royal Philatelic Society London (its Library, its *Museum of Philatelic History at The Royal Philatelic Society London*, and its Philatelic Collections) see 2.3 above. In all research projects these institutions should be consulted as to available material and literature. They will not undertake your research work for you. Most institutions have websites; but few give detailed information as to collections or research materials held.

Items examined should be noted as to where these have been seen, especially if an illustration is in mind. In public collections material should be referred to by the name of the institution, the name of the collection or archive concerned and any volume description and page number, etc. For example: The British Library, Philatelic Collections, the Tapling Collection, Japan section page 12. This will enable others to see what has been examined or to check on your findings at a later date. These details should be noted down at the time of examination, but make sure that notes can be understood later and by others in due course. Where personal photography is permitted notes made at the time as to what has been photographed and where, etc. should also be recorded. Such notes will be an invaluable listing of what was seen and where. This comment also applies to photocopies or similar images and may save time later.

3.2 A few tips when looking at material. Used stamps may be water damaged or their appearance may be affected by postmark ink oil. Has a stamp been damaged by exposure to light? When looking at an item always do so on white or near white paper. A black paper background will almost certainly give a different appearance to a stamp. Always suspect that an item is not what it seems; usually the first action of a good philatelist. Make clear and concise notes in a systematic way as you may not look at them again until sometime later.

3.3 If looking at essays, proof or archival material, record all the notations and reference numbers, etc. that may be associated with the items, even if they do not appear to be important; they may be or become significant later as your research develops.

3.4 Museum, Library and Archive Collections will be available subject to conditions of access; these should be carefully checked well in advance before any approach is made. Most originations holding these collections will require proof of name with signature (Passport) and of address (a utility bill dated within the last three months).

3.5 You should have a clear understanding of the "archival" background of a file, collection or item. This may be that information in an official file is definitive, or in a collection such as the Tapling Collection (the British Library, Philatelic Collections) which was completed in 1899 and therefore it cannot contain a later produced item, a forgery for example.

## 4. Write a plan of your article or book and start writing

4.1 Work out the order in which information or facts will be presented in sections/chapters/paragraphs of your book or article. In a book these will form the basis of the contents page. Facts or information are usually best presented in chronological order or by subject and then chronologically arranged.

4.2 **References are vital**. They should always be given to support a point, prove a fact or to give further, perhaps definitive, information. In any work the question that the reader will ask is how does the author know that? References will give that evidence. Where available, references should be to primary sources, not to secondary sources. Be especially cautious about quoting other people's references one should always examine the material for one's self. Refer to 4.4 for how to write references.

4.3 Include references by a numbered or similar system. These should be listed at the end of an article. In a book they may be the foot of each page, at the end of each chapter or at the end after the last chapter and before the index. The nature of the book will suggest the best method.

4.4 References may be given as follows, or in similar ways so long as the information is complete and in consistent format:
**Books:** Author, title, place of publication, publisher, date of publication, ISBN. For example:  Morgan, Helen, *Blue Mauritius*, London: Atlantic Books, 2006, ISBN 1-84354-435-0. Remember that the title is to be found on the title page and not on the cover or spine.
**Articles:** in a periodical: Author, title of article, title of periodical, volume number (or whole number if the volume system is not used) page numbers, date of periodical. For example: Beech, David R, "How to look after your Collection – A Basic Guide", *The London Philatelist*, Volume 115, pages or pp 68-70, March, 2006.
**Archival references:** These will to some extent depend on the system adopted in the arrangement of the archive in question or the system of the organisation holding an archive. To be sound and so of value as a reference the data required will include: the name of the archive, any volume or file number, page or folio number and the name of the organisation holding the archive.
**Philatelic Collection in public hands:** Tapling Collection, Japan section, page 12: the British Library, Philatelic Collections, London.

4.5 **Always include an index in a book**. Remember that users may wish to refer to information in ways other than the way that the author has presented it. For example, in a book about postage stamps which is arranged in a chronological order of the dates of issue, a user may be interested in a printer, this information may be found almost anywhere in the text. A good index will list the printer and so the desired information will be found. The Index should be prepared last when you are sure the work is complete.

4.6 An index is a list arranged alphabetically at the end of the book, while a contents page or pages appear at the beginning of the book after any Foreword or Preface and before chapter one, and is set out in the order in which the chapters or sections, etc. appear in the book, with the page numbers given. It is surprising just how often the index and the contents pages are confused! While many word processing packages include facilities to allow an index to be generated automatically, this may not be appropriate for some or many works. Such will depend on the depth or complexity of the subject and the text. An index must work for the reader and their compiling is a skilled task. Consider using an experienced indexer; the Society of Indexers in the UK can provide details of suitable indexers.

4.7 It is important to set the scene by describing locations, and giving political, social and economic information, etc. The use of maps is to be encouraged but great care should be taken in matters of copyright.

4.8 All good research work should be published. In a periodical, an article may take the form of work in hand, sometimes put forward for comment, suggestion or criticism, usually in the form of a further article, letter to the editor, etc. The product of such a research process is likely to be seen as definitive or accepted text and become in time the basis of a monograph or book. See 5.6

4.9 Let the facts tell the story, not any prejudgement. Do not make the facts fit your theory or omit unpalatable data. However, if facts are not all known, but there is a theory or theories about events, etc., make it clear that these are theories. Try to think of all of the possibilities.

4.10 Write to tell the story, with its interpretation as may be appropriate, for the record and the reader.

4.11 Resist the temptation to start writing until you are sure that your research is as complete as it can be.

4.12 Start writing your work. Be concise, make your meaning clear, avoid complicated sentence construction and words with obscure meanings, and use the spell checker. Avoid foreign phrases.

4.13 Especially if you are writing a long article for a periodical or printed book, it would be wise to discuss the options and possibilities of publication with one or more potential publishers. It will be pointless, unless one is producing a manuscript only, to write a long text for which no publisher can be found. While those philatelic publishers which are also charities may be prepared to publish at a financial loss, they would prefer to at least break even or produce a profit. Authors need to be realistic about the market for a subject, treatment of subject or size of book (thus cost). Some texts lend themselves to on-line publication, reaching their target audience without particular expense, but these run the risk of being lost when on-line publishers cease to exist. In the region of thirty copies of a printed book are required for legal deposit, review, complimentary and author's copies, etc.

4.14 Some works may be published best in digital form due to size or format and the ability to key-word search. Careful consideration with a publisher may be required.

## 5. Tips and Suggestions

5.1 Always acknowledge those who have helped, including when work to translate from one language to another has been the contribution, this is a philatelic context is a valuable skill.

5.2 Always give references, or provide a bibliography or select bibliography, to published work or other data, including unpublished manuscripts.

5.3 In articles when referring to people who are dead always give their dates; you would be surprised about the number of people alive at the same time with the same of similar names. For example: Sir Edward Denny Bacon (1860-1938). In books this information may be collected into one section, perhaps with further biographic data.

5.4 While it does have a limited place, take great care not to judge past events by the standards of today. Make efforts to understand the history of philately as it affects your subject and the resulting issues of philatelic fashion. For example, the limited number of collectors of Revenue material after the 1914-1918 World War resulting in the rarest material likely to be after that event.

5.5 Always chose a title for your article or book that reflects its contents. For example: *Malta. The Stamps and Postal History 1576-1960*. One that does not is: *Of Kauri and Gold*, which is a postal, economic and social history of the Coromandel peninsular of New Zealand. Authors should bear in mind that databases that list their works will be key-word searchable. The subject key-words are not included in the title *Of Kauri and Gold* and so it will be much harder to find. Perhaps a fitting title would have been "New Zealand: The Postal

History of the Coromandel Peninsula with its associated social and economic development 1750–1993"?

5.6 The research process in periodicals is one of the presentation of facts/ideas/concepts, etc. being put forward to be followed by another author or authors putting forward complimentary or different views, which may extend the subject matter. Over time a consensus or proven view will be accepted. See 4.8

5.7 Accept with an open mind the views of others and give references to others even if they take a different line. It may be that you feel it necessary to comment on others work with reasons for a different interpretation.

5.8 Results that lend themselves to tabulation will probably make understanding clearer.

5.9 All illustrations in your work should be of good quality. The days of the use of photocopies have gone, unless these are all that is available. Images and maps are liable to be copyright and the permission of the copyright owner must be obtained and acknowledged in a style that they determine, as well as permission to reproduce. The ownership of an item is not necessarily synonymous with the ownership of copyright in an image of that item. Learn about the image resolution and format requirements of the targeted publication before images are taken or ordered.

5.10 Grants may be available to meet some or all of the research expenses. These in the United Kingdom are from BPA Expertising Educational Charity; the Philatelic Fund (managed by The Royal Philatelic Society London); the Chand A and Z Research Fund for Classic Philately (managed by the British Library, Philatelic Collections); the Julian Chapman Scholarship (managed by The Royal Philatelic Society London); the Revenue Philately Trust and the Stuart Rossiter Trust.

5.11 Accuracy is everything in research and its publication.

5.12 Get a third party (preferably a philatelist who has published research work) to look at your text and ask him or her to offer criticism and suggestions for improvement. If the topic is not clear to them it will not be clear to the readers. The author is usually too close to the work to see its shortcomings. Check the text for inconsistencies of such things as how dates are expressed, names, etc. Leave the text for several days or longer and review it again. Ideally every book needs an editor for the purposes described above.

5.13 Avoid time relative phrases, like "Recently I found…" or "in the last century", etc.

5.14 It will be useful to understand the meaning of the book terms: foreword, preface and introduction. A foreword (note the spelling) is text typically written by a person of suitable authority who is not the author and customarily congratulates the author. A preface is written by the author and sets the scene, gives the reasons and purposes for the book being written. An introduction is an introduction to the subject matter and usually comments on its context. An introduction may be chapter one.

5.15 For books consider the idea of writing your "easiest" chapter first (even if not the first chapter) and the others may well fall into place.

5.16 The golden rule in research and its publication is that it takes as long as it takes, not just the time that you have available. Especially with a book, you are likely only going to write it once, so make time to get it as right as you can. Set aside plenty of time and then add some more!

It is almost 30 years since the publication of James Negus's *Philatelic Literature. Compilation Techniques and Reference Sources* in 1991. While much has changed during the intervening years, and one thinks especially of digital technology and the internet, the fundamentals have not. James's book remains the bible of the subject and is strongly recommended. I give its details below.

## Select Bibliography

Beech, David R, *A Guide to Philatelic Research at the British Library*, London: David R Beech, First Edition, 2019

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## Acknowledgements

Smithsonian National Postal Museum, Washington DC; Andy Gould, Trustee the Stuart Rossiter Trust; Christopher G Harman; Richard F Holman; Jean-Claude Lavanchy, Curator Philately, Museum of Communication, Bern; Susan McEwen, Trustee the Stuart Rossiter Trust; Richard Scott Morel, Curator, the British Library Philatelic Collections, London; Douglas Muir, Senior Curator Philately, The Postal Museum, London; Professor Charles Oppenheim; Paul Skinner, Lead Curator, the British Library, Philatelic Collections, London; Dr Susan N Smith, Winton M Blount Research Chair, Smithsonian National Postal Museum, Washington DC; Brian Sole; David Tett and Frank L Walton.

After becoming Secretary of his school stamp club at the age of twelve David Beech joined the Expert Department of the philatelic auctioneers H R Harmer Limited in 1970 before becoming Curator of the British Library Philatelic Collections from 1983 to 2013. He was appointed Head of the Philatelic Collections from 1991 to 2013. He is a Fellow of The Royal Philatelic Society London and was President from 2003 to 2005. He was invested as a Member of the Order of the British Empire (MBE) for services to philately in 2012. In 2013 he was the recipient of the Smithsonian Institution Philatelic Achievement Award for outstanding lifetime accomplishments in the field of philately. He has served as a Trustee of the Stuart Rossiter Trust, the Revenue Philately Trust and of the Friends of the British Library. He is currently a member of the Advisory Council of the British Library Collections Trust.