
Introducción a la metodología del *Manifesto Project* y el uso de sus datos para América Latina

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El objetivo de este seminario es discutir la metodología y el uso de los datos del *Manifesto Research on Political Representation* (MARPOR) o *Manifesto Project*. Desde su formación como *Manifesto Research Group/Comparative Manifestos Project* (MRG 1979–1989/CMP 1989–2009), este proyecto se ocupa del análisis de contenido cuantitativo de los programas electorales de más de 50 países, incluyendo todas las elecciones democráticas desde 1945. En 2003 recibió el premio de la Asociación Americana de Ciencia Política (APSA) a la mejor base de datos en Política Comparada. Desde octubre de 2009 se financia a través de una subvención de larga duración de la Fundación Alemana para la Investigación (DFG). Recientemente, MARPOR ha extendido la recolección de programas y su codificación a América Latina con el propósito de ofrecer datos sobre posición y énfasis de partidos y candidatos presidenciales acerca de temas políticos y en las dimensiones de competición relevantes en estos contextos electorales. En este momento, están ya disponibles los primeros datos de Argentina, Brasil y Chile.

Lecturas

Volkens, Andrea y Judith Bara. 2013. "Presidential Versus Parliamentary Representation: Extending the Manifesto Estimates to Latin America" en Andrea Volkens *et al.* *Mapping Policy Preferences from Texts III. Statistical Solutions for Manifesto Analysts*. Oxford: Oxford University Press: 277-298.

Volkens, Andrea; Cristina Ares; Radostina Bratanova y Lea Kaftan. 2015. *Scope, Range, and Extent of Manifesto Project Data Usage: A Survey of Publications in Eight High-Impact Journals. Handbook for Data Users and Coders*. Berlín: WZB.

Werner, Annika; Onawa Lacewell y Andrea Volkens. 2014. *Manifesto Coding Instructions* (5ª ed. rev.) Berlín: WZB.

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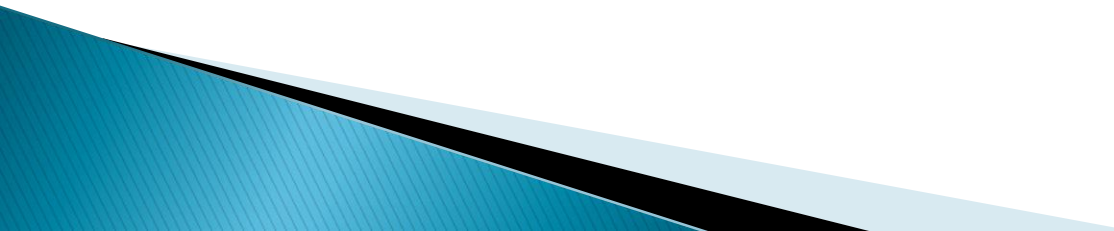
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Contenidos

- El proyecto
 - La metodología
 - Empleo de la base de datos
 - Extensión a América Latina
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El proyecto

El *Manifesto Project* se ocupa del análisis de contenido cuantitativo de programas electorales en más de 50 países, incluyendo todas las elecciones democráticas libres desde 1945

<https://manifestoproject.wzb.eu>

Historia

- ▶ Inicio de los setenta: nace con el objetivo de comparar las estrategias partidarias en Estados Unidos y el Reino Unido durante el período posterior a la Segunda Guerra Mundial (Robertson, 1976)
- ▶ 1979: Ian Budge estableció el *Manifesto Research Group* (MRG 1979–1989) en el seno del ECPR (Consortio Europeo para la Investigación Política)
- ▶ 1989: *Comparative Manifestos Project* (CMP 1989–2009) dirigido por Hans-Dieter Klingemann y coordinado por Andrea Volkens, auspiciado por el Centro de Investigación en Ciencias Sociales de Berlín (WZB)

Historia

- ▶ 2003: concesión del premio de la Asociación Americana de Ciencia Política (APSA) a la mejor base datos en Política Comparada
- ▶ 2009-2021: *Manifesto Research on Political Representation* (MARPOR), financiado a través de una subvención de larga duración de la Fundación Alemana para la Investigación (DFG)

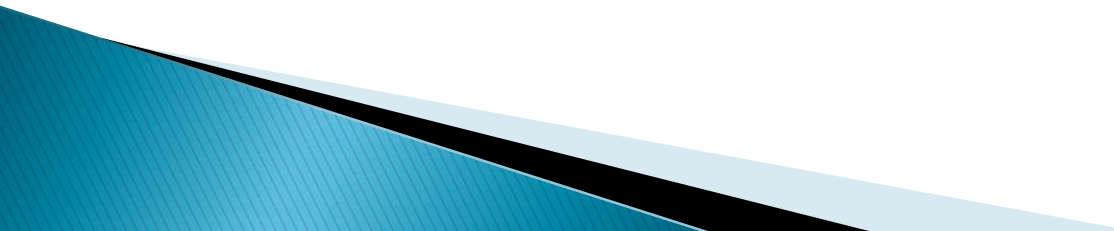
Asunciones del *Manifesto Project*

1. “La democracia funciona siempre igual”, para garantizar que las **preferencias de los ciudadanos** se trasladen a las **políticas** (En las democracias representativas esto afecta a las elecciones, los partidos, las políticas públicas, y algún tipo de mandato de los gobiernos)
2. Los **partidos políticos** son los principales agentes de representación, de la traslación de las preferencias de los ciudadanos a las políticas públicas
3. Los **electores** (para votar en relación a las políticas) conocerán las preferencias de los partidos comunicadas a través de sus **programas** o equivalentes (cuyo contenido les llegará a través de los medios y la discusión política general, aunque no los lean)
4. Los **ejecutivos** emplearán los programas en la formación de coaliciones, las negociaciones entre el Parlamento y el Presidente, la coordinación de Ministerios, etc.

La dimensión izquierda-derecha

- ▶ La relación entre electores y partidos en términos de preferencias sobre políticas públicas, o la forma en que las preferencias de los votantes se trasladan a las políticas, puede estar vinculada a áreas o temas específicos, pero se simplifica alineando los asuntos en un *continuum* izquierda-derecha que ofrece un **marco común de referencia permanente para electores y políticos**

Los programas de los partidos

- ▶ Contienen **la posición autorizada de los partidos** y **permiten rastrear los cambios en las preferencias partidarias de elección a elección**
 - ▶ Equivalentes: otros documentos votados y aprobados por los órganos del partido, entrevistas autorizadas al líder o al secretario
 - ▶ Ofrecen una base mejor para estimar la posición y capturar la variación real que las estimaciones basadas en encuestas
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Objeto de investigación

- ▶ Quizás a diferencia de otros proyectos que producen datos sobre democracia, MARPOR ha seguido una línea de desarrollo lógica y coherente, que evoluciona desde la preocupación por la **competición partidaria** a la **participación en el gobierno y la elaboración de políticas** para examinar finalmente la relación entre partidos, **preferencias ciudadanas** y políticas públicas. En particular:
 1. el rol de los partidos en la conformación de la opinión pública (McDonald y Budge, 2006; Budge y McDonald, 2007)
 2. su papel desde el ejecutivo en la elaboración de políticas (McDonald y Budge, 2005)
 3. la interacción entre partidos y electores a lo largo del proceso de representación (Adams y Ezrow, varios; y Budge *et al.* 2012)

La metodología del *Manifesto Project*

Se trata de una metodología específica de análisis de contenido de textos desarrollada para determinar las preferencias políticas y las posiciones ideológicas de los partidos en base a sus programas electorales. Las preferencias programáticas de los partidos se conciben como indicadores de la oferta del proceso electoral

Análisis de contenido de textos políticos cuantitativo

- ▶ Es una “técnica de investigación para formular **inferencias válidas y reproducibles** a partir de ciertos textos (u otro material con **significado**) en los contextos de su uso” (Krippendorff, 2004: 18)
- ▶ Examina el contenido de los mensajes políticos, sus causas y sus efectos: los “**contextos del texto**” [“Por qué se crearon los textos disponibles, qué significan y para quién, cómo median entre las condiciones antecedentes y las resultantes...” (Krippendorff, 2004: 82)]
- ▶ **Es una técnica consolidada para determinar las posiciones de los partidos en el espacio político**
- ▶ El análisis de contenido de los **programas** puede ofrecer respuestas a muchas preguntas de investigación relevantes derivadas de teorías de la democracia representativa

Pasos en la reducción de los datos

MARPOR

1. Identificación de las unidades de texto	La unidad de codificación puede ser la palabra aislada, la frase o el documento entero (discurso, artículo, libro, película u otro objeto)	CUASI-FRASE (frase o parte de una frase que contiene un argumento completo) Las palabras aisladas no recogen posiciones sobre temas
2. Asignación a las mismas de un código numérico	Correspondiente a la categoría del esquema de clasificación o conjunto de categorías (inclusivas y exclusivas) que reflejan las preguntas de investigación, fruto de la operacionalización de los conceptos teóricos Para garantizar la fiabilidad, es preciso definir claramente las variables y especificar los indicadores que determinan si una unidad de análisis pertenece a una categoría concreta	ESQUEMA DE CLASIFICACIÓN estándar de MARPOR MANUAL DE CODIFICACIÓN. Versión 5. Marzo de 2014 https://manifesto-project.wzb.eu/down/papers/handbook_2014_version_5.pdf
3. Cálculo de la frecuencia de aparición de un código	La frecuencia es un indicador válido de la importancia o relevancia (<i>saliency</i>) que le confiere el emisor, o del interés o intensidad de un asunto	Para testar la TEORÍA DE LA RELEVANCIA punto de partida teórico del proyecto
4. Análisis de las hipótesis de investigación	Pueden emplearse diversas técnicas	

Teoría de la relevancia

- ▶ Los partidos no usan tanto el posicionamiento opuesto como el énfasis selectivo a la hora de competir por votos (Budge y Farlie, 1983; Budge *et al*, 2001)
- ▶ Se diferencia (complementa) las teorías espaciales de la competición electoral que tratan la relevancia de las dimensiones y los temas como algo fijo, representando el espacio político únicamente en términos de posición
- ▶ Pero la estructura del espacio de competición no es fija, sino que varía a través del tiempo y del espacio. Existen temas políticos en los que los votantes están de acuerdo (temas "transversales", *valence issues*) además de los "posicionales" (*positional issues*) (Stokes, 1963)
- ▶ Un partido que ha adquirido más credibilidad que ningún otro en un tema transversal (*issue ownership*; Petrocik, 1996) tratará de darle mayor relevancia en la competición para que afecte al cálculo decisonal del votante

Esquema de clasificación estándar de MARPOR (2014)

ÁREA 1: RELACIONES EXTERIORES

- 101 Relaciones exteriores especiales: positivo
- 102 Relaciones exteriores especiales: negativo
- 103 Antiimperialismo
- 104 Ejército: positivo
- 105 Ejército: negativo
- 106 Paz
- 107 Internacionalismo: positivo
- 108 CE/UE o **integración latinoamericana**: positivo
- 109 Internacionalismo: negativo
- 110 CE/UE o **integración latinoamericana**: negativo

ÁREA 2: LIBERTAD Y DEMOCRACIA

- 201 Libertad y derechos humanos
- 202 Democracia
- 203 Constitucionalismo: positivo
- 204 Constitucionalismo: negativo

ÁREA 3: SISTEMA POLÍTICO

- 301 Federalismo
- 302 Centralización
- 303 Eficiencia gubernamental y administrativa
- 304 Corrupción política
- 305 Autoridad política

ÁREA 4: ECONOMÍA

- 401 Economía de libre mercado
- 402 Incentivos
- 403 Regulación del mercado
- 404 Planificación económica
- 405 Corporativismo/economía mixta
- 406 Proteccionismo: positivo
- 407 Proteccionismo: negativo
- 408 Objetivos económicos
- 409 Gestión keynesiana de la demanda
- 410 Crecimiento económico: positivo
- 411 Tecnología e infraestructura
- 412 Economía controlada
- 413 Nacionalización
- 414 Ortodoxia económica
- 415 Análisis marxista: positivo
- 416 Economía anticrecimiento: positivo

ÁREA 5: BIENESTAR SOCIAL Y CALIDAD DE VIDA

- 501 Protección del medio ambiente: positivo
- 502 Cultura: positivo
- 503 Igualdad: positivo
- 504 Expansión del Estado de Bienestar
- 505 Restricción del Estado de Bienestar
- 506 Expansión de la educación
- 507 Restricción de la educación

ÁREA 6: TEJIDO SOCIAL

- 601 Forma de vida nacional: positivo
- 602 Forma de vida nacional: negativo
- 603 Moralidad tradicional: positivo
- 604 Moralidad tradicional: negativo
- 605 Ley y orden público
- 606 Espíritu cívico: positivo
- 607 Multiculturalismo: positivo
- 608 Multiculturalismo: negativo

ÁREA 7: GRUPOS SOCIALES

- 701 Grupos laborales: positivo
- 702 Grupos laborales: negativo
- 703 Agricultura y ganadería
- 704 Grupos profesionales y clase media
- 705 Grupos minoritarios desfavorecidos
- 706 Grupos demográficos no económicos

https://visuals.manifesto-project.wzb.eu/mpdb-shiny/cmp_dashboard_dataset/

Medidas de relevancia

Relevancia de una categoría: porcentaje de cuasi-frases que el programa electoral le dedica sobre el número total de cuasi-frases

Relevancia de una dimensión: suma de los porcentajes de todas las categorías que se refieren a la dimensión, incluyendo categorías que contienen pronunciamientos a favor y en contra

Índices posicionales

Uso de dos categorías opuestas o combinación de varias categorías que se refieren a una dimensión. Clasifican las posiciones en un *continuum* de favorable a desfavorable ¿Cómo crearlos?

Indicador combinado de posición y relevancia: restando el porcentaje de cuasi-frases a favor y en contra. Influye el número total de cuasi-frases. Defendido desde la teoría de la relevancia, ya que alargar el programa incorporando temas es el resultado de una estrategia consciente. Escala: -100/+100.

Indicador de posición pura, separando la relevancia: indicador de posición / suma de los porcentajes de ambas categorías. Independiente del tamaño del programa. Preferido desde un enfoque espacial de la competición. Escala: -1/+1.

Creación de índices propios

▶ **Enfoque deductivo**

Asigna categorías a los dos polos de una determinada dimensión atendiendo a consideraciones derivadas de teorías existentes que se quieren testar

▶ **Enfoque inductivo**

Utiliza métodos estadísticos tales como el análisis factorial como forma de descubrir las dimensiones latentes que están tras los datos. Útil cuando se tienen dudas sobre las categorías adecuadas, y como una forma exploratoria para hallar pruebas estadísticas de las mediciones obtenidas deductivamente

La escala izquierda-derecha de MARPOR (RILE)

- ▶ La dimensión que ha despertado mayor atención entre los usuarios de la base de datos del proyecto
- ▶ Contiene 26 categorías (código)

Izquierda

Derecha

Antiimperialismo (103)
Ejército: negativo (105)
Paz (106)
Internacionalismo: positivo (107)
Democracia (202)
Regulación del mercado (403)
Planificación económica (404)
Proteccionismo: positivo (406)
Economía controlada (412)
Nacionalización (413)
Expansión del Estado de bienestar (504)
Expansión de la educación (506)
Grupos laborales: positivo (701)

Ejército: positivo (104)
Libertad y derechos humanos (201)
Constitucionalismo positivo (203)
Autoridad política (305)
Libre empresa (401)
Incentivos (402)
Proteccionismo: negativo (407)
Ortodoxia económica (414)
Restricción del Estado de bienestar (505)
Forma de vida nacional: positivo (601)
Moralidad tradicional: positivo
Ley y orden público (605)
Armonía social (606)

▶ **Relevancia RILE**

1. Relevancia de la dimensión: suma de las 26 categorías. Varía de 0 a 100.
2. Relevancia izquierda: suma de las 13 categorías de izquierda
3. Relevancia derecha: suma de las 13 categorías de la derecha

▶ **Posición RILE**

1. Posición: porcentaje de relevancia de la derecha – porcentaje de relevancia de la izquierda. Varía de -100 a +100.
2. Posición pura: posición / porcentaje de relevancia de la derecha + porcentaje de relevancia de la izquierda. Varía de -1 a +1.

- ▶ Frente a la supuesta crisis de las ideologías, los datos de MARPOR han demostrado que la dimensión izquierda-derecha es dominante en los países de la OCDE (Volkens, 2004). Persiste en el tiempo una clara diferenciación en la dimensión izquierda-derecha entre los principales partidos en competición (Volkens y Klingemann, 2005). No hay una tendencia convergente a largo plazo, sino ciclos de convergencia y divergencia
- ▶ De hecho, “el gran logro del proyecto de investigación *Manifesto* ha sido determinar el cambio de políticas defendidas por los partidos en una variedad de países y en un amplio período de tiempo a lo largo de la dimensión izquierda-derecha” (Budge y Klingemann, 2001: 20)
- ▶ Sobre la congruencia política entre partidos y votantes, las distancias entre partidos y votantes son más pequeñas cuando se miden en la dimensión izquierda-derecha como bloque ideológico que cuando se hace en relación con temas o políticas concretos

La escala centro-periferia

- ▶ Puede crearse de diversas formas. Partiendo de la teoría de Rokkan sobre el conflicto centro-periferia, deductivamente, Alonso (2012) emplea para el cálculo 6 categorías (código)

Centro (gobierno central)

Periferia

Centralización (302) Forma de vida nacional: positivo (601) Multiculturalismo: negativo (608)	Descentralización (301) Forma de vida nacional: negativo (602) Multiculturalismo: positivo (607)
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▶ **Relevancia centro-periferia**

1. Relevancia de la dimensión: suma de las 6 categorías. Varía de 0 a 100.
2. Relevancia pro-periferia: suma de las 3 categorías de periferia
3. Relevancia pro-centro: suma de las 13 categorías de centro

▶ **Posición centro-periferia**

1. Posición: $\text{porcentaje de relevancia pro-periferia} - \text{porcentaje de relevancia pro-centro}$. Varía de -100 a +100
2. Posición pura: $\text{posición} / \text{porcentaje de relevancia pro-periferia} + \text{porcentaje de relevancia pro-centro}$. Varía de -1 a +1

Críticas a MARPOR

▶ **Uso de cuasi-frases como unidades de codificación**

Se emplean porque son superiores a las palabras para capturar el mensaje así como más insensibles a variaciones irrelevantes en el contexto espacial o temporal. Además, las palabras no hablan por sí solas sino que para "usar palabras como datos" (Laver, Benoit y Garry, 2003) se requiere información adicional como opiniones de expertos

▶ **Codificación manual**

Se ha mantenido porque solo las personas pueden atribuir significado y eliminar las variaciones triviales en el texto, alcanzado mayor validez que los ordenadores. Se garantiza la fiabilidad con el entrenamiento y las pruebas que deben superar los codificadores

▶ **Categorías de codificación permanentes**

La insensibilidad del esquema de clasificación al contexto puede parecer limitante a un investigador interesado únicamente en un país y período temporal concretos. El esquema de clasificación está diseñado para el análisis comparado extenso

▶ **RILE**

1. Su carácter permanente. Se ha mantenido porque funciona
2. Las 26 categorías tienen la misma importancia en el cálculo, cuando las preferencias pueden tener diferente grado de izquierdismo o derechismo [El método *Vanilla* de Gabel y Huber (2000) funciona mejor en este sentido]



¿Para qué codificar programas si tenemos datos de encuesta a expertos nacionales mucho menos costosos?

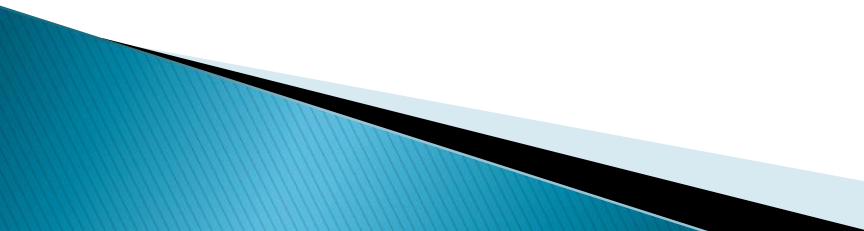
Para el análisis comparado dinámico

Debilidades de los datos de encuesta

- ▶ El centro de cada sistema de partidos es definido por los encuestados en cada momento y lugar, por lo que no se recoge una parte de la variación entre los casos
- ▶ Desconocemos qué información se tiene en cuenta para decidir la ubicación de los partidos. No se discrimina entre intenciones y políticas puestas en marcha, ni se captura el cambio de posición a lo largo del tiempo

Las estimaciones de MARPOR son los únicos indicadores que capturan la variación en las preferencias partidarias entre países y en el tiempo

Grandes fortalezas de MARPOR

- ▶ La recolección y el tratamiento de los datos
 1. está fundamentada en una teoría sólida que se pretende testar
 2. se centra en las instituciones y procesos nucleares de las democracias (en particular, los partidos políticos)
 3. es decididamente comparativa
 4. su insensibilidad a las palabras y herramientas retóricas contextuales permite eludir la variación trivial para capturar las diferencias políticas de fondo
 5. mide el cambio en los partidos, los electorados y los gobiernos
 - ▶ La base de datos
 1. incluye 1000 partidos desde 1945 a la actualidad en más de 50 países de cinco continentes
 2. no está vinculada a temas de investigación específicos
- 

Ampliaciones de MARPOR

- ▶ *Regional Manifestos Project* (Alonso, Gómez y Cabeza, 2013; Alonso, Volkens y Gómez, 2012)
 1. Adaptación del esquema de clasificación original mediante la introducción de subcategorías para la competición a nivel regional y una nueva forma de clasificar el posicionamiento de los partidos respecto a la distribución territorial de competencias. Es aplicable de manera universal para el análisis de los programas electorales de los partidos en sistemas políticos multinivel
 2. Datos inéditos sobre elecciones regionales en España y el Reino Unido
<http://blogs.deusto.es/programasaldesnudo/regional-manifestos-project/#sthash.Umz4mhZH.dpuf>

- ▶ *The Euromanifestos Project* (Wüerst y Volkens, 2003)
 1. Codifica los programas electorales de las elecciones al Parlamento Europeo de todos los partidos que en algún momento han obtenido representación
<http://eeshomepage.net/euromanifesto-study/>

Empleo de la base de datos

Nuevo proyecto *Scope, Range, and Extent of Manifesto Project Data Usage: A Survey of Publications in Eight High-Impact Journals* (Volkens, Ares, Bratanova y Kaftan)

¿Qué es SRE?

- ▶ Un proyecto basado en el análisis de contenido de los textos que citan el *Manifesto Project*, puesto en marcha a raíz del vertiginoso aumento de las citas a MARPOR. Comprende aspectos sustantivos y metodológicos

<https://manifestoproject.wzb.eu/publications/all>

- ▶ Objetivos

1. Acceso rápido y preciso a la literatura
2. Conocimiento de distintas posibilidades de uso de los datos de la base de MARPOR
3. Información sobre metodología para el análisis de preferencias políticas
4. Identificación rápida de estudios de caso sobre países o políticas concretas

¿Cómo se ha elaborado la base de datos de SRE?

- ▶ Empleando una clasificación compuesta por 159 variables, se han codificado 245 artículos publicados entre los años 2000 y mediados de 2015 en 8 revistas de alto impacto

Frecuencia	Revista
26	<i>American Journal of Political Science</i> (AJPS)
5	<i>American Political Science Review</i> (APSR)
31	<i>British Journal of Political Science</i> (BJPS)
32	<i>Comparative Political Studies</i> (CPS)
52	<i>European Journal of Political Science</i> (EJPS)
41	<i>Electoral Studies</i> (ES)
17	<i>The Journal of Politics</i> (JP)
41	<i>Party Politics</i> (PP)
245	

Esquema de clasificación de SRE

Áreas de uso	Variables
Ámbito	Temas de investigación Dimensiones de políticas Métodos de extracción <i>(variables 6 a 17)</i>
Alcance	Países Tipos y familias de partidos Períodos Actores <i>(variables 18 a 28)</i>
Extensión	Críticas a MARPOR Validez Fiabilidad <i>(variables 29 a 140)</i>
Identificación del texto	<i>Variables 1 a 5</i>
Cómo citar el texto	<i>Variables 150 a 159</i>

Productos

- ▶ Base de datos
- ▶ Manual de codificación: Volkens, Andrea/ Ares, Cristina/ Bratanova, Radostina/ Kaftan, Lea (2015): *Scope, Range, and Extent of Manifesto Project Data Usage: A Survey of Publications in Eight High-Impact Journals. Handbook for Data Users and Coders*. Berlín: WZB.

<https://manifestoproject.wzb.eu/datasets/mpduds>

Destacados

Temas

Competición y estrategias partidarias

Relaciones votantes-partidos

Posiones partidarias/alternativas

Formación de coaliciones

Dimensiones

Hasta 20 diferentes

Protagonismo de la dimensión izquierda-derecha

Métodos de extracción predominantemente deductivos

Uso extensivo de RILE

Críticas

Sobre todo a RILE

Todos los tests de validez y fiabilidad incorporados obtienen resultados satisfactorios

¿Cómo contribuir a SRE?

- ▶ Codificando publicaciones propias que hagan referencia a MARPOR (cualquier producto de interés científico: libros, comunicaciones, etc.)
- ▶ Pasos a seguir
 1. Familiarizarse con las variables y categorías de SRE
 2. Codificar el texto empleando Excel o Stata
 3. Añadir nuevas categorías a las variables, solo si fuese imprescindible
 4. En este último caso, actualizar el manual de codificación
 5. Enviar el archivo Excel o Stata con los datos y, si procediese, el manual de codificación actualizado a: manifesto-communication@wzb.eu

Extensión a América Latina

Para el estudio comparado de las democracias
parlamentarias y presidenciales



Democracias parlamentarias, semi-presidenciales y presidenciales

- ▶ Como en las anteriores extensiones territoriales de la base de datos, se añaden nuevos casos para esclarecer preocupaciones teóricas, a fin de contribuir a discriminar lo esencial de lo accesorio del proceso democrático
- ▶ La cadena de representación funciona sin grandes variaciones entre Estados Unidos y las democracias parlamentarias europeas, y entre éstas últimas y las semi-presidenciales. La causa de esta similitud es para MARPOR el papel protagonista que juegan los partidos en todas ellas
- ▶ **Para poder ir más allá del terreno de la especulación resultaba preciso iniciar un estudio comparado de las democracias parlamentarias y presidenciales. Y en la base de datos del proyecto no había un número suficiente de regímenes presidenciales**


La dimensión izquierda-derecha

- ▶ La intuición de MARPOR es que esta dimensión también sirve para simplificar las relaciones entre electores y partidos en América Latina, como indican las opiniones de expertos (Wiesehomeier y Benoit, 2009; Wiesehomeier, 2010), datos de encuesta a élites parlamentarias (Alcántara, 2008 y 2012), autoubicación en el eje ideológico de los votantes (Latinobarómetros), y capacidad de los electores para ubicar los partidos (Colomer y Escatel, 2004)

Implicaciones metodológicas del clientelismo, el populismo y el presidencialismo

- ▶ ¿Los partidos latinoamericanos son del todo, o incluso sobre todo, programáticos o más bien obtienen apoyo comprando votos (clientelismo) o enfrentando al electorado contra los partidos y élites establecidas usando políticas con las que no están firmemente vinculados (populismo)?
- ▶ Las elecciones presidenciales podrían centrarse en mayor medida en las cualidades personales de los candidatos, quienes a su vez podrían no estar vinculados a los partidos. Los programas para las elecciones presidenciales podrían tener más frases retóricas que los parlamentarios
- ▶ Si los partidos y los programas estuviesen en la periferia de la política podríamos estar estudiando cosas distintas o el estilo y la retórica programática en lugar del contenido

- ▶ Soluciones que podríamos barajar
 1. Clientelismo: podríamos añadir subcategorías para los grupos clientelares (como se ha hecho para muchos países de Europa central y oriental)
 2. Populismo: cabría manejar un esquema de clasificación paralelo centrado en la retórica populista y personalista para recoger las diferencias que no pueden capturar categorías basadas en las políticas

 - ▶ Decisión: proceder con cautela pero de forma conservadora (Nótense las implicaciones teóricas y conceptuales derivadas de acertar con este enfoque) En base a la experiencia con partidos populistas europeos se considera que el esquema sirve para capturar los matices clientelares y populistas. Podremos afirmar que sus variables recogen las principales diferencias entre partidos latinoamericanos tras comparar: partidos clientelares y otros, populistas y no populistas, y programas presidenciales y parlamentarios
- 

Dificultades en la recogida de los datos

- ▶ Aunque el período democrático no es largo en la mayoría de los países, como en casos anteriores, no existen archivos sistemáticos y no pueden recuperarse algunos programas y completarse las series. Para ello, es preciso recurrir al mejor documento disponible aunque no sea propiamente equivalente: resumen de prensa del contenido de un programa perdido, discursos del líder, u otros. Los codificadores locales proponen documentos alternativos, pero bajo supervisión y aprobación. En cualquier caso, la base de datos especifica cuando se ha codificado un “equivalente” y los usuarios pueden excluir estos datos
- ▶ La existencia frecuente de un programa del presidenciable y otro de su partido en el Parlamento. Incluso, la creación de un partido nuevo por parte del primero que puede o no presentarse a las elecciones legislativas después. Solución: recoger todos los documentos que puedan contener la posición acreditada del partido

Proceso de codificación

- ▶ Se aplican a América Latina los desarrollos introducidos en la metodología de MARPOR en los últimos años para todos los casos: comunicaciones instantáneas con los codificadores, supervisión más sistemática país a país, etc.
- ▶ ¿Debemos modificar el esquema de clasificación? Recordemos que la razón de ser de las estimaciones del Manifiesto Project es la comparabilidad: o eso o nada, y por tanto la importancia de mantener las 56 categorías de codificación en el espacio y en el tiempo a fin de garantizar que las variaciones reflejan cambios en la realidad y no solo en la medida.
- ▶ Cabe la adaptación mediante la creación de subcategorías susceptibles de ser agregadas en las categorías originales, en base a razones de peso y previo test. Coste: mayor complejidad del ejercicio de codificación y necesidad de añadir nuevas reglas para garantizar la fiabilidad, aunque el riesgo se minimiza al agregar las subcategorías

Nuevas subcategorías (esquema de clasificación estándar de MARPOR, 2014)

ÁREA 1: RELACIONES EXTERIORES

103 Antiimperialismo

103.1 Antiimperialismo centrado en el Estado

103.2 Influencia financiera exterior

ÁREA 2: LIBERTAD Y DEMOCRACIA

201 Libertad y derechos humanos

201.1 Libertad

201.2 Derechos humanos

202 Democracia

202.1 General: positiva

202.2 General: negativa

202.3 Democracia representativa: positiva

202.4 Democracia representativa: negativa

ÁREA 3: SISTEMA POLÍTICO

305 Autoridad política

305.1 Autoridad política: competencia del partido

305.2 Autoridad política: competencia personal

305.3 Autoridad política: gobierno fuerte

305.4 Élités anteriores: positivo

305.5 Élités anteriores: negativo

305.6 Rehabilitación y compensación

ÁREA 4: ECONOMÍA

416 Economía anticrecimiento: positivo

416.1 Economía anticrecimiento: positivo

416.2 Sostenibilidad: positivo

Nuevas subcategorías (esquema de clasificación estándar de MARPOR, 2014)

ÁREA 6: TEJIDO SOCIAL

601 Forma de vida nacional: positivo

601.1 General

601.2 Inmigración: negativa

602 Forma de vida nacional: negativo

602.1 General

602.2 Inmigración: positiva

605 Ley y orden público

605.1 Ley y orden: positivo

605.2 Ley y orden: negativo

606 Espíritu cívico: positivo

606.1 General

606.2 Activismo de abajo arriba

607 Multiculturalismo: positivo

607.1 General

607.2 Inmigrantes: diversidad

607.3 Derechos indígenas: positivo

608 Multiculturalismo: negativo

608.1 General

608.2 Inmigrantes: asimilación

608.3 Derechos indígenas: negativo

ÁREA 7: GRUPOS SOCIALES

703 Agricultura y ganadería

703.1 Agricultura y ganadería: positivo

703.1 Agricultura y ganadería: negativo

Partidos y parlamentarios

MARPOR

PELA

ÁREA 1: RELACIONES EXTERIORES

104 Ejército: positivo

Gasto público en Defensa y Fuerzas Armadas

ÁREA 4: ECONOMÍA

401 Economía de libre mercado

Acuerdo con "El Estado debería intervenir lo menos posible en la sociedad y dejar a la iniciativa privada que atienda las necesidades de los ciudadanos"

Presencia estatal en la economía

Privatizaciones de la industria estatal/de servicios públicos

409 Gestión keynesiana de la demanda

Intervención del Estado para dar trabajo a quienes quieren trabajar

411 Tecnología e infraestructura

Gasto público en infraestructuras

412 Economía controlada

Intervención del Estado en el control de los precios

ÁREA 5: BIENESTAR SOCIAL Y CALIDAD DE VIDA

501 Protección del medio ambiente: positivo	Intervención del Estado para proteger el medio ambiente
503 Igualdad: positivo	Acuerdo con "La intervención del Estado en la vida socioeconómica es la única manera posible de reducir las desigualdades sociales"
504 Expansión del Estado de Bienestar	Intervención del Estado en la provisión de vivienda
506 Expansión de la educación	Intervención del Estado para garantizar una educación primaria/secundaria/universitaria general y gratuita

ÁREA 6: TEJIDO SOCIAL

603 Moralidad tradicional: positivo	A favor de la presencia de valores cristianos en la política
604 Moralidad tradicional: negativo	A favor de la presencia de principios seculares en la política
605 Ley y orden público: positivo	Gasto público en seguridad ciudadana



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Presidential Versus Parliamentary Representation: Extending the Manifesto Estimates to Latin America

Andrea Volkens and Judith Bara

JUSTIFYING THE EXTENSION

Manifesto data development has always been driven by research concerns—first those of the MRG, then the CMP, now MARPOR (Chapter 1). The research focus, broadening out from party competition to government participation and policy-making, and then to the parties' role in linking these to popular preferences, has given the estimates a cohesion and logical line of development absent from mere data gathering 'about democracy'.

There are dangers in being too generic and general. But datasets can also be over-specific—too much tied to particular research topics. Fortunately the Manifesto data have avoided this problem, as attested by so many political scientists in such a variety of research contexts across the world (Chapter 1).

This general interest stems from the fact that the research driving data collection and refinement has always been resolutely comparative in its scope, model building and theory testing in its approach, and focused on the central processes and institutions of democracy, particularly political parties. Data generated on this basis cannot but have a general appeal across the whole of political science and beyond, as they bear so much on major the problems the discipline has to confront.

Datasets are not, of course, merely passive fodder for theoretically inspired research. They have a considerable dynamic of their own. Particularly as they become larger and more complex, more linkages are made. New variables created on the basis of the old open up more quantified fields for theorizing and eventually for operationalizing and checking the theories. The prime examples in the case of the manifestos are Kim and Fording's (1998, 2001) creation of new measures of popular opinion (the Median Voter) and of Government policy stance. Another is the incorporation of other data—first expenditure data reflecting the policies actually enacted by governments (Budge and Hofferbert 1990) and then the surveys of electoral opinion which we have related to party positioning in the previous two chapters.

The natural corollary of data development has been expansion of the associated research beyond its initial concerns with party behaviour per se to the role of

parties at other political levels—in moulding and ‘averaging’ popular opinions (McDonald and Budge 2006; Budge and McDonald 2007; McDonald, Best, and Budge, forthcoming) and in policymaking in government (McDonald and Budge 2005). Increasingly therefore, the estimates have been applied to the whole process of representation in democracies, a process which has culminated in the various analyses of elector-party interaction carried out by Adams, Ezrow, and their associates (Table 1.4) and in *Organizing Democratic Choice* (Budge et al. 2012).

Accompanying and spurring their use within ever-widening contexts, has been the estimates’ territorial expansion. Starting with the 20, stable, mainly Western, democracies originally analysed (Budge, Robertson, Hearl, eds, 1987), the collection has expanded to the other OECD nations and to all the countries of the EU and beyond, in Eastern Europe and the Caucasus.

While the time frame given by the post-war period has remained constant¹ the inclusion of countries with very different historical backgrounds (and in some cases with a somewhat tenuous hold on democracy) has stimulated something of a rethink about the extent to which parties do—or even can—respond to electoral stimuli. With rapid democratization electors may well be confused about what they want in policy terms, and in the face of rapidly changing electoral alliances, and even of changing parties themselves, may lack a framework within which to focus or state their preference. Under such circumstances parties may well follow their own internal policy leads and are perfectly capable of doing so, even in stable democracies (Budge, Ezrow, McDonald 2010). This has major consequences for the dominant paradigm of party representation (Downs 1958: 112–21) which sees parties as directly driven by popular preferences.

The extension of the data collection beyond the core of stable democracies might be seen as merely mechanistic—more amended data can be collected, therefore they are—or even sinister.

But in fact the extended coverage is linked closely to theoretical concerns. Manifesto-linked research has always been based on the assumption that democracy works the same everywhere. Despite national and institutional idiosyncrasies, countries that claim to be democracies have to guarantee that popular preferences will be translated into government policy. How such a guarantee can be provided is the focus of study and analysis, and many details are obscure. But it is clear, under modern representative democracy, that it must involve elections, parties, and policy, and some kind of mandate binding on governments. To vote on policy must involve knowing where parties stand, through something like manifestos and their equivalents, and governments themselves have to orient themselves through such documents in order to follow the most popular alternatives, if they are to function democratically.

Adding new democracies helps us sort out essentials from non-essentials in the democratic process, by increasing variation in the latter and allowing the essentials to manifest themselves more clearly and generally. One ultimately unimportant element so far as the practice of democracy is concerned, may be institutional variations such as presidential versus parliamentary regimes. While central to much in everyday politics, the differences may not affect democratic fundamentals. This shows up in everyday discourse where we happily characterize both types of regime as ‘democracies’. Our previous analyses of representation show little difference in

this regard between the United States and European democracies, or between parliamentary and semi-presidential regimes in Europe itself. Perhaps this is because all of them are party-based above all else and parties bridge the distance between representatives and voters which devices like the separation of powers sought to put in place.

Of course such speculations are just that—speculation—at the present time. To ground them more firmly we have to initiate a well-grounded comparative study of parliamentary and presidential regimes. While we have plenty of the former in the current dataset we have few of the latter. This provides a major justification for extending our data collection to Latin America, the largest geographical grouping of presidential regimes in the world, so we will then have sufficient cases on both sides to carry out reasonable statistical comparisons.

The argument against such an extension is as always that social and other circumstances differ so much from the Western democracies on which the research was initiated, that no controlled comparison is possible. The political differences which will inevitably occur cannot be tied down to any single institutional feature. They result rather from the complex interaction of many differentiating factors. Similar arguments were made in regard to Central and Eastern Europe in the 1990s. The countries there were expected to take decades to stabilize as recognizable democracies, so the effort of collecting manifestos and studying them as if they were part of a recognizably democratic process was misplaced. Of course what actually happened was entirely the reverse. Carried to extremes, of course, the argument from national peculiarities would tell against comparing Western countries—or even going outside limited periods of time within a country. Similar-sounding arguments have been used by some textual analysts (e.g. Slapin and Proksch 2008; Laver, Benoit, and Garry 2003) who stress the unique political rhetoric of periods as limited as a decade, to which computerized analyses are so sensitive that they cannot be easily extended (at least within the same frame of reference).

Given the obvious differences between time periods, countries, and continents, such arguments clearly have weight. To take them wholly on board is however to rule out comparative analyses altogether, confining political science to historical or case description. The counter-argument is that mass societies in the modern world generate much the same problems in the economy, welfare, civil liberties, inequality, etc. everywhere, so they have to discuss and handle them in much the same way. In an era of increasing globalization problems are defined similarly and require the same solutions and political instruments to tackle them. If the country claims to be democratic the instruments are elections, parties, parliaments, and governments which borrow institutionally and ideologically from each other and follow well-defined precedents from the past.

There is thus considerable intellectual justification for doing as we have already done and comparing democracies—wherever and whenever they are—within a common research framework. We can then see empirically whether we get plausible and interesting results out of the comparisons. The findings of such an analysis will never be totally conclusive. But then they do not need to be. If we adopt a hypothesis-testing approach we need never take them as final truth. All we need to do is to establish a theory’s current credibility in the face of existing evidence (itself subject to validity and reliability tests of the sort reviewed in Part II). This done, we can collect more and better evidence to test it further, always

bearing in mind the controls which differing social and economic conditions render necessary. If comparison is indeed not possible this will become rapidly apparent from our inability to interpret results. But we must give it a try. Not to do so is not only to rule out a systematic study of our political problems. It is to rule out the very possibility of political science.

So far we have concentrated on what the extension to Latin America can do for manifesto-based research. As a preliminary to discussing its operationalization there we should also ask what manifesto collection and analysis can do for Latin American political research. We already have election and public opinion surveys, voting statistics, and institutional information. What do manifestos add? The short answer of course is that they tell us about political parties' thinking at particular time-points and the visions of the past and future on which these are based. Parties are the key agents in democratic representation, the translation of popular preferences into public policy. They do this by presenting voters with defined choices at elections and carrying them through—if they get enough popular support—into government agenda-setting and policymaking.

Manifestos and their equivalents gain importance from the central role of parties because they are usually the only authoritative statement made by the party as such, and hence the only way electors can get information about what the party currently stands for in policy terms, and on this basis cast an informed vote. Few read the actual document of course but its contents are relayed through the media and general political discussion.

The manifesto is not only important in informing voters and defining their choices but in recording for the party what it has promised to do in government, and in providing the only Five Year Plan that exists in democracies for social, economic, and other development. As such it provides an important basis for coalition formation—if that is required—or for parliamentary-presidential negotiations, or even for coordinating the actions of individual government ministers, as usually no other overall policy guide is available.

Its uniqueness as an authoritative, written party programme which can be constantly checked and referred to, is what gives the manifesto (or its equivalent) its standing in any democracy, including the Latin American ones. Its analytic uses for researchers everywhere have been amply demonstrated in the preceding chapters. If we want to trace out policy changes from election to election, create dynamic time series, chart what median or plurality electors vote for, or see what governments intended to do, what better than to base ourselves on what parties, the key intermediaries and agents in all this, actually said publicly at the time? This provides a better basis for estimating real positions and capturing the true variation than either survey-based estimates (Chapter 2) or historical impressions.

Manifestos, in short, do for Latin American politics what they do for the study of democracies everywhere, offering all the advantages of comparative, over-time, multilevel analysis which we have examined in this book, along with a high level of measurement reliability. The big question is about validity in this context. Will the analysis apply to Latin America, given its cultural and political peculiarities? In the end validity can only be proven if the Manifesto estimates produce the same useful and plausible results in Latin America as they have elsewhere. A first step, however, is effective implementation of procedures and measures, which we discuss in the next section.

IMPLEMENTING THE EXTENSION

We have of course already confronted the problems associated with extension in earlier experiences with Central and Eastern Europe, after the peaceful revolutions of 1989–1990. With what, 20 years on, seems close to visionary insight, Hans-Dieter Klingemann initiated a programme of document collection and analysis for the new democracies which was effected at the practical level by Andrea Volkens, systematizing the procedures followed by the original MRG. In spite of scepticism about whether the new party manifestos would even connect with reality, they proved in the end, with some Eastern exceptions, to perform very much as they did in the West (see the 'mappings' and analyses in Klingemann et al. 2006: 9–60).

We draw practical lessons from how collection and coding proceeded there in the 1990s. The major insight, however, is that the modifications required were relatively minor and that the new data were relevant and valid—and useful, if not indispensable, for studying not just democratization but democracy.

PROCESSES INVOLVED IN EXTENSION

Archiving

Paralleling the chapters of Part III, the practical processes involved in extension are document collection, coding, and archiving. The latter, in the shape of MPD_b (Chapter 10), is already set up to provide coding help and initial quality checks, storage not just of manifesto estimates but of linked and analytic datasets, along with actual texts, and easy up-to-the-minute distribution. This is a far cry from the CEE data being released only in 2006—15 years after document collection was initiated—and then only in the form of numeric variables.

Archiving therefore is no problem. Latin American documents and data will be entered and distributed simultaneously with their collection just like the other country information.

One convenience that MPD_b provides is prior entry of other linked datasets—voting statistics, institutional variables, censuses, surveys, expenditures. On analogy with what has already been done we know these are necessary for refined analysis, so we can plan immediately for their acquisition. Two rich sources are the LATINO BAROMETRO annual surveys at electoral level, modelled on the Eurobarometer series, and PELA—Parliamentary Elite surveys in five waves over 17 countries (1995–2008). Expert judgements on the party positioning of parties and presidents have been collected (Wiesehomeier and Benoit 2009; Wiesehomeier 2010). All these of course will have to be adjusted for 'centring' on the basis of the Manifesto estimates, when we have them, in terms of the procedures laid out in Chapter 2 and applied to the CSES (Chapters 12 and 13).

Supporting, archiving, and distributing the Latin American estimates thus presents few problems, thanks to the preparatory work of MARPOR under the DFG grant. What remain as more problematic are document selection and collection (Chapter 8).

DOCUMENTS: SELECTION AND COLLECTION

Literature searches, supplemented by contacts and discussions with Latin American specialists and political scientists, indicate that parties there follow much the same procedures as their counterparts elsewhere, in the sense of having electoral programmes approved by representative congresses, and issuing them as authoritative and unique statements of the party policy position for that election. This is to be expected. The parties are based on general ideologies—socialist, conservative, Christian—familiar from Europe. Constitutions and procedures also derive from there, often brought over by immigrants in the early twentieth century. Where the US has exerted an influence, American procedures follow generally European lines anyway.

In terms of the formal set-up therefore, manifestos or their equivalents—official statements or authorized interviews by the Leader or Party secretary in lieu of a document voted on and approved by a Party Congress or delegate conferences—are thus known to be available. Various collections have already been started (see, for example, Bruhn, 2004; 2006) which cover a full range of relevant countries, such as Mexico and Uruguay. MARPOR aims to build a systematic and extensive collection of relevant documents which are susceptible to coding and which will produce estimates comparable to those already available for OECD, EU, and CEE countries. We do not anticipate much difficulty in extending them, given our existing contacts. We will hopefully be able to include presidential platforms for a full range of Latin American countries. These will, however, be more problematic, given the tendency for candidates to present different versions of their platforms which would thus produce multiple documents for the same party.

There are, however, two potential difficulties and one advantage in tracking down suitable documents. The advantage is that the time period involved is quite short for most countries. Most democracies only emerged in the seventies or eighties, after the withdrawal of US support for traditional or military-based dictatorships. We are not therefore seeking out musty documents which may even have been deliberately destroyed by authoritarian regimes or disposed of by their custodians because of the dangers of holding them.

On the other hand, awareness of their research and historical value may have come rather late so that systematic archives do not exist, many single documents went missing, and generally series are hard to constitute. Of course this situation is not unfamiliar from countries we have already covered in Europe and elsewhere.

In these circumstances we will also have to have recourse to substitutes, less 'equivalent' than the alternative ways of authoritatively stating policy mentioned earlier. Newspaper summaries are always a valuable source for the content of missing manifestos. Given the desire to provide as accurate estimates of party policy positions as possible, it would be with great reluctance that we would use policy position papers, leader speeches, or other less authoritative documents. However, we will try to create full time series with estimates based on the best documents available.

Here the debate touched off by Hansen (2008) and Gemenis (2012) has already stimulated improvement in the procedures codified in Chapter 8 above. There will be central inspection and approval of what country coders choose as equivalents to the official manifesto. These will be scored in terms of 'equivalence' (Table 8.1)

and results reported for each document and estimate in MPD_b . Users will thus be able to make their own decisions as to which estimates to include and exclude on grounds of document credibility. Replacement of less credible by more authoritative documents will be a continuing process, done country by country to maintain comparability of national coding.

All this, of course, will be no more than what is already being carried out with existing documents and estimates. For Latin America, however, it should substantially enhance the quality of data at the point of collection and entry rather than leaving improvements until later. The extension there should benefit from all the resources it has been possible to put into the data infrastructure under the DFG grant.

One institutional peculiarity does affect document collection under the Latin American presidential regimes. That is the frequent occurrence of separate election programmes for the president and his or her party in the legislature. This is sometimes due to the elections being held at different times. But even in concurrent elections separate programmes may be issued. The situation is even more complicated when the presidential candidates, despite previous party affiliations with parties represented in Congress, go on to create their own support party, which may or may not contest legislative seats later.

It may be difficult to work out which are the uniquely authoritative pronouncements in this situation. In many countries procedures are changing and regularizing to approximate American and European models. There are parallels with, for example, Ireland (Mair 1987), where parties progressed from newspaper interviews with the party leader or insertion of a standard national policy statement in constituency leaflets, to issuing manifestos as such in the 1970s. Under these circumstances the best policy for Latin America seems to be to collect all documents that have any claim to be authoritative statements for the party, score them in terms of Table 8.1, but re-evaluate them retrospectively as we gain more knowledge of the characteristics they have and the circumstances in which they were produced. Such evaluations will also be aided by analysing the documents themselves which we have collected, to see which 'cohere' as authoritative programmes.

CODING: PROCEDURES AND FRAMEWORK

In terms of coding procedures the refinements introduced over the last few years of the DFG grant in through of computer assistance: instantaneous communication, and ever more continuous and detailed supervision of country-by-country coding, can all be introduced without difficulty to the Latin American project. Whereas in the past communication and supervision attenuated with distance, this is no longer the case. Paradoxically, Latin American coding will be in every practical sense 'nearer' to the CMP scheme than Poland was in 1990.

The main difficulties arise in regard to the coding frame. The basic question as with CEE, is whether and how far it should be adapted to the (presumably) different political circumstances of Latin America?

We do not of course know how different these really are; and there are strong a priori arguments and some practical evidence, which we go into later, for saying

they are not. The *a priori* argument is that the problems political parties have to grapple with, particularly globalization, are so similar everywhere that 80–90 per cent of manifesto content has to be substantially similar. Political parties also develop the same rhetorical devices, often borrowed from each other, and are in the same election situation anyway, in democracies, so the way they present these similar problems will also be reasonably comparable. Hence the common content will dominate and crowd out any particular country nuances, providing a guarantee that any sensible coding scheme which covers one set of modern democracies will cover the others without much modification.

This is an argument already rehearsed in Chapter 5 which justifies keeping the same 56 coding categories across time and space on general, substantive grounds. We would in any case be bound methodologically to retain the same coding frame wherever the project takes us, to provide a measure which does not itself vary across time and space. This is the only basis on which we can be sure that over-time and cross-national variation reflects true change and not just variation in a varying measure (see Chapter 5).

There can be no compromise on keeping the original categories as they are, wherever and whenever we apply them. The Manifesto estimates are a basis for comparison or they are nothing. Nevertheless, they also serve users whose interest is in areas like Latin America as a whole or subareas within it (the Southern Cone, Central America, the Caribbean, etc.) or individual countries like Mexico and Brazil. These analysts' interests lie in matching up party positions with those of a particular electorate, or even in specifying the national history more precisely. Thus the choice is not an absolute one—a comparative set of categories versus nationally-specific ones. It is rather how, within the general framework, we can adapt categories to capture national nuances.

The obvious compromise which was adopted for the previous extension to CEE, and to some extent by the MRG earlier, has been to keep the original 56 categories intact but to allow coding into subunits within them which can always be re-aggregated into the original categories. In this way we allow both for expected national or situational idiosyncrasies (in CEE reintegration of old communist cadres for example) while retaining the old categories intact at an aggregate level. That last condition has always been a *sine qua non* for the MRG, CMP, and MARPOR. Without it comparison would be impossible. While retaining the comparative base subunits do however seem to provide a firm basis of compromise with nationally or area-oriented analysts.

Compromises, however, are never entirely costless. Compromises with national specialists in developing the coding frame beyond its original 27 categories produced some 16 low-use, error-prone, and somewhat ambiguous main categories (Laver and Budge, eds, 1992: 23–5)—which have, however, had to be kept ever since for comparative purposes. As already stressed, we would never think of modifying the general coding frame any further. Subunitization nevertheless imposes some costs in terms of rendering coding decisions more difficult and possibly more ambiguous. Error, however, is most likely to occur between related subunits. Therefore aggregation into the original MRG categories will take care of most of it.

Nevertheless, one is bound to ask from a general point of view whether we really need to capture national nuances or whether the ultimate purpose from the point of view of a comparative science of politics is not to transcend

them. We speculate that one strength of the coding frame from a comparative point of view may be its insensitivity to the precise use of words and rhetorical devices employed in texts from one particular time or country. This renders it robust enough, in contrast to computerized techniques, to transcend such ultimately trivial variation and capture real policy differences.

Actual evidence on the need for subunits comes from two sources—first, our earlier extension into CEE, and second, our pilot study of Mexico (discussed later). The very different experiences of the Central and East European countries and the advice of country specialists working in an essentially historical and descriptive tradition prompted the creation of very large numbers of subcategories to deal with anticipated differences from the west. These may have proved of some use for particular country specialists. From a comparative point of view, however, they have not been particularly valuable. The most telling evidence against them is that discriminant analyses designed to maximize differences between party groups (Klingemann et al. 2006: 31–2; Chapter 3) have actually drawn very little on the policy areas designated by the subcategories in the subcategories and aggregated up to 24 categories rather than down to the 56 main and 53 subcategories available. The standard left-right scale also gave a plausible mapping for the CEE countries of party movements without needing any further refinement (Klingemann et al. 2006: 4–26)—an experience repeated for Mexico (Figure 14.1). The Mexican coding in fact required very few subunits (Bruhn 2004, 2006).

We are thus not ruling out subcategories for the Latin American countries. But we are suggesting that a powerful and convincing case, if possible couched in area rather than specific country terms, has to be made for them before they are included. If possible they should be piloted before being incorporated into the general coding process. We report later in this chapter on the one pilot study done to date—Mexico. Meanwhile we discuss two bases of possible Latin American exceptionalism which might affect coding—populism and clientalism.

CLEARING CONCEPTUAL UNDERGROWTH: DEALING WITH CLIENTALISM, POPULISM, AND PRESIDENTIALISM EMPIRICALLY

It has been suggested that Latin American parties are not entirely or even primarily programmatic, since they obtain support either by buying votes for parties (clientalism), or through inciting the populace against established parties and elites in association with a variety of leftist or rightist policies, to which they are not firmly bound (populism). This is encouraged by presidential elections focused on personal qualities, where the candidates may have few or no links with existing parties.

All this has methodological implications, for if programmes and the parties which issue them are on the periphery of politics rather than at its heart then clearly we should be studying different things—or perhaps studying programmatic style and rhetoric rather than content.

This substantive debate about how to understand and approach Latin American politics thus has major methodological implications for our project.

Clientalist promises might indeed be handled within the existing coding frame by expanding the social group categories to long lists of client groups, as was in fact done for many countries in CEE. The idea that a content-based coding completely misses the important elements of the populist appeal might, on the other hand, suggest using a whole parallel coding scheme distinguishing personalist and anti-elite rhetoric from conventional policy-oriented content, which might be the reserve of existing parties as opposed to flash, populist ones. Chavez' frequent invocations of Jesus Christ as the first socialist reformer, for example, would be lost within our 56 policy categories. We might also expect presidential programmes to contain more of this kind of rhetoric than parliamentary ones.

These considerations also touch on how far we should modify our general coding frame to accommodate area or country nuances. The suggestion here might even support the creation of a parallel coding scheme focused on populist and personalist rhetoric to capture the differences missed by our policy-based one.

Our experience from CEE teaches us to be cautious here. There too specialists argued that totally different coding approaches were necessary to deal with the politics of a totally different area—one in which democracy was appearing for the very first time in some countries, and populism and authoritarianism were entrenched. Yet the general coding scheme seems after a quarter of a century to have functioned quite well. In particular the left-right scale (considered in more detail in the next section) makes plausible distinctions between party families and shows parties stabilizing themselves as time goes on, and in Central Europe better than in the East, as might be expected.

The coding frame has also, of course, had to cope both with clientalist and populist parties in the West. The Italian Christian Democrats, for example, monopolized the Ministry of Public Works for 45 years and built or inherited patronage networks in the South. Both PASOK and New Democracy did so in Greece. Yet these parties also issued normal policy programmes which placed them at left, centre, and right just as well as experts managed to do.

In terms of populist right parties in Europe, the CMP has been criticized for placing them in the centre in many elections on the basis of their programmes. As pointed out in Chapter 5, however, such parties' rightist policies are often balanced by leftist ones. They too have to appeal in elections to a vote which is substantially more centrist than themselves, so what they actually say is often centrist too.

Furthermore, a static labelling as 'Radical Right' (or Radical Left) cannot be applied forever to such dynamic entities as parties, which may remain in their family but also evolve in terms both of policy position and collaboration with 'democratic' parties (Klingemann et al. 2006: 80–3). The left-right scale accurately catches such evolution over time in the case of major parties, such as the Austrian FPÖ (from 'party of government' to right-wing populism in the last two decades of the 20th century; back to being 'party of government' in the new millennium) and the Italian AN (as it became an almost permanent constituent of mainstream right-wing coalition governments in the 1990s and early 2000s).

All this goes to suggest that the established coding frame is well able to capture clientalist and populist nuances within its established categories without the need for special alternative or supplementary categories. Of course we cannot entirely rule out the need for these in Latin America a priori. But experience does suggest

that we should proceed cautiously and with a presumption on the side of the existing framework.

There are three broad lines of approach we can take here, all suggested by previous methodological chapters in this book:

- (i) Trying out the existing coding frame, only very sparingly subunitized if at all, in pilot countries chosen so as to reflect the varying national politics we might expect to find in Latin America. We have already done so in Mexico, with encouraging results. If the current frame applies without too much difficulty, why not use it?
- (ii) Mexico has also allowed us to construct the standard left-right scale (RILE) and to examine the plausibility of party movements on it (Figure 14.1)—as well as closeness of parties to supporters (Table 12.1). We suggest carrying out such a check for all five or so pilot countries eventually examined. The left-right scale is deliberately designed to reflect all the variables in the coding frame (Chapter 5)—even non-left-right categories contribute to placements. It is also the variable overwhelmingly used in 80 per cent to 90 per cent analyses. Hence, the ability to tap into plausible party differences and movement is convincing evidence of our policy based approaches relevance to Latin America.
- (iii) At another—party—level the relevance of coded programmes to explain relevant political phenomena on their own can be checked by discriminant analyses of the type described in Chapter 3 and earlier used with European parliamentary groups from both East and West (Klingemann et al. 2006: 28–44). Three are in fact three central dependent variables we could use to see whether our variables do demonstrate their relevance to the major party differences in Latin America:
 - (a) Clientalist versus other parties. Can we distinguish a consistent difference between the types of appeals such parties could be presumed to make (group versus general-policy-oriented), or of course whether the difference lies in issuing national programmes at all? Previous experience with Mediterranean Europe indicates that all parties do and in their programmes talk about general policy concerns. But we do not need simply to assume that for Latin America. We can test it and in this way put the question on a strictly empirical footing.
 - (b) Populist versus non-populist. We can divide parties up in this way (not to mention presidents on the basis of their programmes) on the basis of specialist judgements. Then we can see what distinguishes them (e.g. in terms of populist 'mixing up' of policy appeals which the literature claims not to be firmly embedded in their ideology).
 - (c) Presidential versus parliamentary programmes. Again, if there is no empirical distinction between their contents they can be coded and analysed in the same terms, with no special allowance. Conversely, if there are systematic differences our codings clearly can reveal them and again be used for discriminant analysis without having to be extended in any way.

The general argument here, therefore, is that we should proceed cautiously in collecting and preparing data in Latin America, on the basis of established

procedures and categories. Only if there is strong evidence against their applicability should the project go into the labour and costs of supplementing them. This is the lesson learned from the earlier extension to CEE and it should be applied in Latin America.

The analyses here, if they proceed as expected and demonstrate the general applicability of the existing approaches, would also have considerable theoretical and conceptual implications, of course. The first would lie in demonstrating that Latin America—as many specialists themselves have argued—is not a special case. The surface differences which emerge between continents and countries do not affect the fundamentals of domestic politics—elections, campaigns, parties, and voting decisions—which operate in terms of their own internal logic in much the same way everywhere.

This would also imply that the special factors associated with Latin American ‘exceptionalism’, above all clientalism and populism, are not so important after all. Parties, and the left-right divisions they promote, crowd them out practically and theoretically. This is a question we go on to examine in more detail in the next section.

MAPPING LEFT-RIGHT PREFERENCES: THE CASE OF MEXICO

A unique strength of the Manifiesto estimates is that they measure party policy positions in each election on the basis of the specific programme the party lays down for it, so we can also measure change and movement not only in parties but ultimately in electorates and governments. If policy is the major basis on which parties define their position and attract votes—even if we still leave some space for clientalism and candidate populism—the way is clear to study precisely how parties and electors relate in policy terms and how these relationships result in popular preferences being translated into public actions.

While parties and voters could conduct their relationships within a series of discrete policy areas, the universal finding from democracies elsewhere is that issues are simplified by aligning them along the left-right continuum that then provides a common frame of reference both for voters and politicians. Left-right differences define the main approaches to the universal problems facing modern democracies and hence constitute a permanent reference point in democratic debates and analyses. We know that Latin American parties, with their roots in European political thinking, used left-right rhetoric throughout the twentieth century. The question is how far the rhetoric has taken root at other levels of society, among supporters as well as leaders.

There is a lot of evidence from earlier surveys that it has. Expert judgements on Latin American parties and presidents (Wiesehomeier and Benoit 2009; Wiesehomeier 2010), and from parliamentary elite surveys (Alcantara-Saez 2008, 2012), and voters’ left-right self-placements (Latinobarometros) all point to a single, classic left-right dimension. The Latinobarometros surveys also show that ‘Latin American electorates tend to be highly ideological and consistently located on the left-right dimension’. In addition, voters are able to place the parties on it (Colomer and Escatel 2004).

Coppedge (1997) was able to classify parties along the classic left-right dimension, modified by a Christian versus secular conflict inherited from the nineteenth century. With the help of comprehensive reference volumes on political parties in the Americas (Alexander 1988; Ameringer 1992) and checks by country specialists, he set up a classification system based on these cleavage lines. He was thus able to distinguish between Christian right, Christian centre-right, Christian centre, Christian centre-left, secular right, secular centre-right, secular centre, and secular centre-left. Other blocs such as environmental, regionalist, ethnic, or feminist could also be located at points of the main dimension. While this analysis points to a certain multidimensionality in the policy-space, one must remember that the evidence came from before or at the very beginning of the modern democratic era initiated by the effective withdrawal of the US from Latin American politics. If the experience of CEE is anything to go by, left-right—already the major dimension in Coppedge’s analysis—will become increasingly dominant.

Our own content-analytical approach has already been successfully applied to programmes in three Latin American countries. The Mexican data (1946–2000) mostly stem from the CMP phase of the project and were produced by a centrally-trained coder (Bruhn, 2006). (See <https://manifesto-project.wzb.eu>.) Researchers in Chile and Uruguay independently employed two coders for each programme. The Chilean study also covered presidential programmes (adopting CMP-like procedures) and few subcategories were needed to take care of idiosyncratic issues.

All these studies found a left-right dimension underlying their estimates. The example provided in Figure 14.1 demonstrates the pattern as far as the main

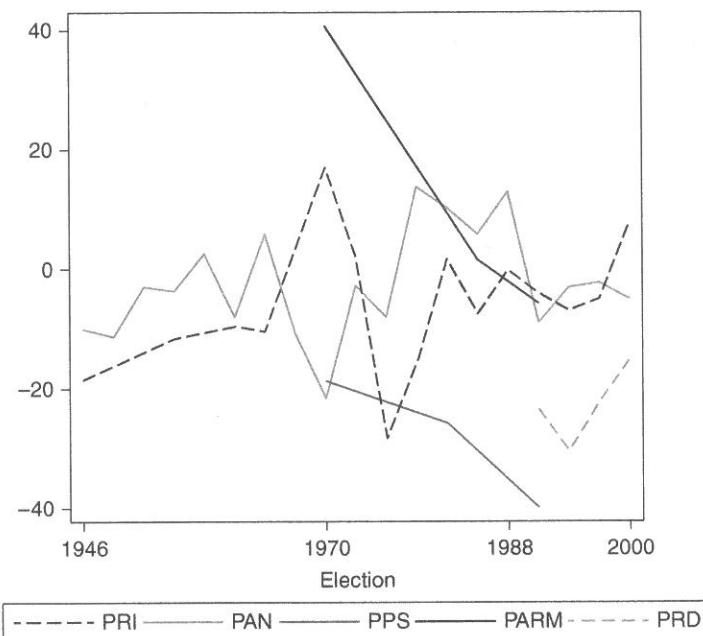


Figure 14.1 Left-right positioning of the main Mexican parties, 1946–2000

parties in Mexico are concerned and suggests that the left-right scale is as widely applicable and analytically useful in Latin America as elsewhere in the world.

Mexico, of course 'so far from God and so close to the United States', is an interesting and important case in its own right. One cannot be sure how far it is representative of the other Latin American countries—even the other 'Big Three' of Argentina, Chile, and Brazil. However, the confirmatory findings of the Chilean and Uruguayan content analyses provide evidence at this point for thinking it might be.

Mexico was the first of the Latin American countries to react against US domination. The Revolution of 1910–1920 produced a highly organized and institutionalized party, renamed as the Institutional Revolutionary Party (PRI) in 1946, which took as its aim the preservation of the institutions and social reforms of the Revolution. These were further extended under the presidency of Cardenas (1934–40). Whatever the achievements of individual presidents however—and they were expected to take a strong lead—they remained closely bound to the PRI and were required to retire after one period of office. Open political opposition to the ruling party was actively discouraged and elections were considered as occasions for reaffirming popular support for the PRI rather than for replacing it. Real alternation was confined to essentially left-right factions within the party.

This accounts for the party's strong programmatic alternation between the mid-60s and the mid-80s as the different factional presidents swung party and state policy right and left, ending up near the centre. This move was associated with two developments. One was the long-drawn-out negotiation of a North American Free Trade Zone—very important for Mexico as it gave access to the vast US market. Rapprochement in turn entailed greater democratization and scope for opposition, effectively the National Action Party (PAN), a centre-right bourgeois party based in the Northern States. To compete effectively it had to organize a national mass base in emulation of the PRI. This began to bear fruit from the mid seventies onwards.

In Figure 14.1 we noted how Mexican parties have been very effective by international standards in gathering together like-minded supporters and responding to them in terms of left-right policies. This is further evidence, deriving from survey as well as programmatic evidence, that the left-right dimension 'fits' Mexican politics. The policy developments sketched in Figure 14.1 broadly separate out the main parties appropriately to left and right apart from their reversal of position in 1970, until with effective electoral competition both go for centrism in the 1990s.

Bearing in mind that the 'centre' of Mexican policy positions has traditionally been on the centre-left, the PRI lurch rightwards in 1970 derives clearly from its nomination of Echeverria, who was president from 1970 to 1976. Economic crisis had meant that Echeverria was constrained to forgo the more leftist elements of his original platform and focus instead on supporting the currency and building up the oil industry as a source of export income. Echeverria's successor as president, López Portillo (1976–1982), was less prepared to compromise his leftist approach, which included support for the Sandinistas in Nicaragua. He was succeeded in turn by the centre-right economist de la Madrid (1982–1988), who took a more neoliberal approach to economic policy, Salinas de Gortari (1988–1994), and Zedillo (1994–2000), both of whom pursued a centrist course. The party's move to the centre-right in 2000 as a means of dealing with further

economic crises, even leapfrogging the opposition PAN, was not sufficient for them to retain control of either the presidency, which passed to Fox (2000–2006) or the parliamentary institutions. They remained in opposition until 2012 and the regaining of the presidency for the PRI by Peña Nieto.

The path followed by the PAN closely resembles that of the PRI. Although clearly to the right of the PRI, this party is also centrist in orientation and indeed mirrors the movements of its main rival. The party is essentially a moderate Christian democratic party, although its main focus is on doing 'what is best' for the nation. It first obtained seats in the Chamber of Deputies in 1946 and gradually developed as the main opposition focus, culminating in its successful capture of a relative majority in 2000 (46 out of 126 seats) in alliance with the Green Ecologist Party. Their economic stance was to favour free enterprise, privatization, and free trade. PAN repeated this success in 2006, with Calderon becoming president.

The 'third party' in Mexican Politics is the Party of the Democratic Revolution (PRD). A splinter from the PRI, the party was formed in 1989, mainly to combat what was seen as the PRI's corrupt and oligarchic organization. The PRD incorporated a number of supporters of smaller parties, including dissidents from the Communist Party. It presents itself as the real social democratic party of Mexico. Although strong in urban centres, especially Mexico City, the party enjoyed only limited electoral success until the first decade of the twenty-first century, when it emerged as the 'second party' in both the presidential and parliamentary elections.

Other parties which have been active across three or more elections are the Popular Socialist Party (PPS) and the Authentic Party of the Mexican Revolution (PARM). The PPS is the successor to Mexico's traditional Marxist-Leninist Communist Party and adopted a fairly extreme leftist position. It ceased to be an official party in 1997. PARM was seen as a 'satellite' of the PRI and after its ill-fated first attempt to mount a presidential election campaign in 1988, it too ceased to function. The Labour Party (PT) is not included in Figure 14.1 as it had only contested two elections before joining forces with the PRD in 2000. It had aligned itself electorally with this party even prior to the formal alliance.

When we have the full Latin American codings assembled we will reproduce left-right graphs of party movement for all the countries and validate them, as for Mexico, against their historical experience and independent evidence. The suitability of the graphs can be judged on similar criteria, such as whether the parties one would expect to be on the left, like the PRI, usually are and correspondingly whether nationalists and conservatives are on the right. We shall also be seeking, in terms of Chapter 6, to see whether exceptional lurches right and left can be explained by other factors such as the choice of candidate.

Validating the left-right scale in this way also constitutes a check on the estimates as a whole, as they all contribute in some way to its construction. We have every reason both from our pilot and the other evidence reviewed here to think that it will fit—with the further measurement consequences for estimate reliability and limited error already reviewed. Of course, we cannot be finally sure about these till we have the full Latin America data collection and coding done. At the moment, however, existing literature and evidence points to the assumptions and procedures sketched being broadly correct. We shall accordingly proceed on their basis.

ENACTING POLICY: PARTIES, PRESIDENTS,
AND PARLIAMENTS

The MRG was a pioneer in distinguishing between the policy *intentions* laid out in party and government documents, and actually enacted policy in the shape of laws, actions (e.g. military interventions), regulations, and money actually spent (Budge and Hofferbert, 1990; McDonald and Budge 2005; Budge et al. 2012). Analysts ignore this distinction at their peril, as intentions can be changed much more quickly and completely than what is actually being done on the ground. This gives rise on the one hand to unrealistic worries about the disruptive effects of party alternation—everything will change overnight (Aldridge 1994)—and on the other to popular scepticism about whether parties ever carry through their election promises. They do in fact try to. But they have to proceed slowly and events often overwhelm them (Budge et al. 2012, Chapter 7). This may apply even more in Latin America.

In studying representation—the extent to which popular preferences get translated into public policy, it is of course enacted policy which is more important. Representation would indeed be a sham if proclaiming intentions for change were taken as equivalent to actually effecting them. Nothing could be more calculated to breed disillusion and cynicism. We shall take particular care in the extension to Latin America to collect expenditure data (as well as any other enactment indicators which are available) and link them to the Manifesto estimates, so we can see how far priorities get carried through. Fortunately MPD_b renders such linkage easy.

By seeing whether party intentions more powerfully determine public action under presidential as compared to parliamentary regimes we can to some extent answer questions about the difference institutions make. One problem in Latin America is of course that we are dealing almost exclusively with presidential regimes, so there is little institutional variation to play with. However, there are no barriers to combining Latin American with previously collected data for other areas of the world. Clearly area needs to be controlled for in making such general comparisons. If the institutional regime exerts any influence at all on prospects of enactment this ought to emerge even so.

It must be said that our previous research has *not* revealed much of a link. The great surprise of our early investigations was that US parties were in fact so similar programmatically and ideologically to their European counterparts (Budge, Robertson, Hearl, eds, 1987) and equally—but not greatly more—successful in imposing their priorities on expenditure (Klingemann, Hofferbert, Budge et al. 1994: 147–54). The easiest generalization to make is that there is no obvious difference. This is also true in comparisons involving France with its powerful presidency. In general, countries line up in terms of efficacy without much regard to parliamentary/presidential differences.

Why so little effect? It is clearly to be found in the subversive entry of party into the old institutional setup. Both the French and US presidents are heads of a major party which is normally able to give them office and secure a supporting majority in the legislature. In this situation the president functions much like a prime minister with a single-party majority in parliament who can count on measures

being carried through almost automatically. Of course there are periods of divided control when this is not the case. There might be likened however to multiparty legislatures where bargaining and coalition formation are both the order of the day. Here too there is little to distinguish presidential from parliamentary systems.

The key variable in fact seems not presidency but party. Where one party can control both executive and legislature, parliamentary and presidential systems function similarly. Where they are in different hands or control within each is divided coalitions—whether permanent or temporary—are necessary to pass legislation or approve a budget.

Such a situation does not of course automatically result in action being incongruent with popular preferences. Compromises usually push the parties on the wings towards the median party at the centre. Citizens in most countries tend to be predominantly centrist in their preferences (Budge et al. 2012, Chapter 5). Hence coalitions and multiparty bargaining may well increase representational congruence (and long-term responsiveness and lack of bias) with citizens, in terms of actually enacted policy.

One cannot of course push this argument to extremes. Lack of internal and external unity, third-party interventions, rise and fall of ‘flash’ parties, may all lead to *immobilisme*, as in the French Third and Italian First Republics—an inability to enact policy at all. While the status quo may suit some, growing social pressures and need for reform may alienate a growing majority. This has often been noted by commentators (e.g. Mainwaring and Shugart 1997) as a particular problem for Latin America.

The populist figure of Chavez in Venezuela comes to mind here, with his reliance on personalized support and failure to institutionalize a policy-based party (though of course he might also be said to have met many long-standing policy demands). In general the tendency for presidents to form their own parties and to run independently of the legislature contributes to large numbers of parties, organizational instability, and a lack of internal party discipline. In turn these disrupt policymaking. These conditions have been most evident in the Andean and certain Central American Republics.

This almost stereotypical image of Latin American politics is however contradicted by the case of Mexico, with its strong institutionalized parties connecting reasonably well with a mass base, as we have seen, and with limitations on presidential terms. Chile has strong competition between two strongly ideological but moderate parties with long historical antecedents. The populist dictator Peron in Argentina founded a lasting mass party which, as in Mexico, prompted the opposition to organize itself similarly. In Brazil Lula da Silva left a similar institutional successor, Dilma Rouseff. If presidential majorities in the assembly do facilitate effective policy-making (Foweraker 1998; Mainwaring 1990, 1993) these developments should help. Mainwaring and Shugart argue that, next to the constitutional powers of presidents, ‘partisan power shapes the character of executive-legislative relations and largely determines the president’s ability to turn a legislative programme into policy’ (1997: 14). As we have seen, policy-making is impeded by highly fragmented party systems and lax party discipline. So, in addition to institutional executive-legislative relationships, the ‘partyness’ of governments (Katz 1986) clearly has an impact on policy delivery.

FOCUSING ON PRESIDENTS

We should not, however, just write off presidents in favour of parties. Even in Mexico the president is supposed to give a strong lead, initiate a new policy phase, and issue his own programme. There is thus a second chain of representation, running from the preferences of voters to the preferences of directly elected presidents as heads of government and from the preferences of the president to policy delivery. When both presidents and assemblies can claim legitimacy, presidents may elevate themselves above political parties (Merkel et al. 2003, 2006; O'Donnell 1994). The leeway for the president to depart from policies pledged by her party is argued to be particularly broad in situations of non-concurrent elections. Concurrent elections 'link presidential candidates to the policy platforms of the parties they represent' (Laver, Benoit, and Sauger 2006: 669). In such elections, 'congressional parties gain or lose seats based on the battles won and lost by the president' (Lebo and O'Green 2011). Clear presidential majorities in the assembly, more likely with concurrent elections, tie presidents to their parties (Foweraker 1998; Mainwaring 1990, 1993).

In presidential systems, we also expect the degree of policy delivery to depend upon the relationship between the president and his party. Where a party may have selected a non-affiliated person or a non-member as their presidential candidate rather than someone from its own ranks, such a candidate is less likely to toe the party line than a former party member. In situations where it was the presidential candidate who created his own party, we would expect a 'presidentialized' party programme, which reflects the view of the presidential candidate. Furthermore, we should expect such a candidate to deliver policy priorities as stated in the party programme because the successful presidential incumbent would have had significant control over the contents of the programme.

While we know that some Latin American presidential candidates do issue their own programmes (Stokes 2001a), no comparative information has been available to date which specifies when and under which conditions they choose to do so. We expect these 'presidential' programmes to be more common in non-concurrent elections, although it is known that presidents sometimes campaign on their own programme even in concurrent elections (Bruhn 2004, 2006).

In cases where there are two programmes, one by the party for the parliamentary elections and one by its presidential candidate for the presidential elections, we expect to find some differences between the party's and the presidential candidate's policy positions. But in situations where the presidential candidate created their own party, the contents of both programmes would more likely have been determined by the presidential candidate. In this case, the distance between the two programmes is likely to be small.

All of these possibilities remain speculative at the moment. They do, however, provide hypotheses and questions for our empirical analyses to address. The first question is the relative balance of classic party programmes as opposed to president-party programmes or purely personal presidential ones. If there are significant numbers of each we want to analyse them (probably by discriminant analyses) to see if they differ significantly in terms of content and in what respects. And, thirdly, we want to compare their effects on enacted policy to see whether

there is one principal chain of representation in the Latin American countries or whether all take on some importance.

While such analyses are interesting for answering recurrent enquiries about Latin American politics we are certainly far from wanting to 'assess the systems . . . largely in a vacuum' (Crake 1999: 279). Our existing comparative estimates, and the many analyses done on them, will all serve to set Latin American politics in their wider world context. In turn we expect MPD_b to be broadened and enriched by their inclusion. For general theory and model building we need to encompass the full range of institutional and political variation in the world and Latin America can be expected to add significantly to that.

SPANNING TIME AND SPACE WITH THE
MANIFESTO ESTIMATES

The extension to Latin America testifies to the estimates' ability to span time and space in a way which—uniquely—permits dynamic comparative analyses. Superficially it might seem that expert surveys do the same thing at less expense. Asking country specialists to place their own national parties along a number of dimensions and calculating reliability in terms of their dispersion along these continua, gives a truly international coverage of 200-odd countries existing in the world today, and probably covers all democracies (Benoit and Laver 2006).

Nobody can deny that locating parties in this way usefully quantifies the original party family classification, as Castles and Mair (1984) first claimed, and provides a first cut at differentiating between countries where there is no better information available. Being done within the national context and based on party reputation and history they have, however, flaws from a measurement point of view which render them misleading once we move from simple nation-by-nation description to comparative explanation. These are:

- (a) their failure to capture a great deal of cross-national variation owing to experts' 'centring' of their own party system (Chapter 2)—not a bias captured by (national) dispersion-based error terms
- (b) their even more conspicuous failure to capture over-time policy change. Even when assessed independently at different time-points (McDonald and Mendès 2001, 100; Klingemann et al. 2006: 67–8) party positions hardly move, and when they do it is probably down to error.

Unfortunately, the experts' undervaluation of cross-national variation and total disregard of temporal changes has contributed to a general impression that parties are static rather than dynamic entities, and hence to criticism of the Manifesto estimates as unduly variable (e.g. Slapin and Proksch 2008: 716). Expert judgements are in this way misleading rather than informative for analysts and need correction from the only indicators that do capture variation, the Manifesto estimates. Having these, however, why use expert judgements at all except as some kind of validity check (McDonald and Mendès 2001)?

- (c) A problem here, however, is the basis—and possibly varying bases—of expert judgements. What do the experts have in mind—especially across different countries and areas of the world—when giving parties scores, for example on a left-right scale? As Huber and Inglehart (1994) demonstrate, other criteria of judgement can vary a great deal. Experts are essentially ‘placing’ a party on general reputation rather than current policy. A major element must be the other parties it has allied with, either electorally or in terms of government coalitions in the recent past. Such alliances, however, are often what expert judgements are called upon to explain, in the sense of the parties closer to each other coming together. Using them analytically in this way carries major risks of tautology (Budge 2000). One must be careful what one wants to explain. As electors’ judgements of where the parties stand are also based on reputation and past history, substituting them for experts carries the same explanatory risks.

Unfortunately, the results of some computerized routines are also contaminated by the expert ratings fed in to start them off. Given some initial input, computer programs can identify words in given texts, such as manifestos, as associated to a greater or lesser degree with, for example, ‘left’ or ‘right’. One way of doing this is to create an a priori dictionary and locate texts to left or right in terms of the words they use (Klingemann 1983). However, no dictionary-based program has yet succeeded in distinguishing parties and their movements very clearly (Bara 2001: 148–56).

In order to introduce more initial leverage, Wordscores (Laver, Benoit, and Garry 2003) input expert scorings of the parties for specimen texts, the words in which are then counted and associated probabilistically with the overall score. Counting their occurrence in other texts allows that in turn to be scored and compared with the originals. While party movement can be mapped in this way, there is a reliability problem with the selection of initial texts—why *these* texts? The generation of the scores from expert ratings also renders their explanatory or predictive uses suspect, e.g. if we deduced from parties moving closer together that they are more likely to go into coalition together, this derives in part from the fact that they already have been in coalition together, which is near-tautological and not too illuminating.

Moving from generally a priori approaches to a strictly inductive one, Slapin and Proksch (2008) in Wordfish employ differential word use by the German parties 1990–2005 to score their policy positions. This produces a reasonably plausible representation, which however flatlines four out of five parties. What is not clear is how the approach would operate in a wider comparative and temporal context. Would one simply analyse German manifestos in the same way over the whole post-war period despite changes in the meanings and use of words over that period? What if the results from such an analysis contradicted those for the narrower period? Which would be more authoritative? Would one build a time series through a very broad 50- or 60-year analysis, or by combining analyses for narrower periods?

There are two problems associated with a wider comparative use of the Wordfish technique across countries. One is the problem of centring already raised in regard to expert surveys. If Wordfish is applied country by country the national

party positions will always be distributed, round a national zero at the mid-point. However, this will eliminate important cross-national variation. The same problem might occur in comparing narrow time periods even within the same country.

A second problem is that the political lexicon, the parties’ differential use of words, has to be estimated inductively country by country. Clearly there will be different lexicons for each. Left-right is to be estimated simply by inputting whole manifesto texts to Wordfish. Are we then to take national left-right scores based on different word contrasts as equivalent for estimating cross-national movements and comparing party positions? Presumably analysts would wish to base themselves on a content-specific left-right scale where they know the differences involved, rather than on a contentless one simply assumed to be equivalent.

Inductive constructs in general (Gabel and Huber 2000; Proksch and Slapin 2008) will always be sensitive to changes in word use or in the texts on which analysis is based. The inclusion of Latin America by contrast is simply a larger extension to MPD_b, which is continually expanding and changing—if only to accommodate new elections as they are held, or to move to better texts and codings for old ones (Chapters 8 and 9). The only way in which such extensions can be accommodated without changing the other estimates a priori, invariant measures whose content is universally interpretable, and transparent to users (see Chapter 11). So far the only candidates are those developed by the MRG/CMR and currently used by MARPOR.

The measurement qualities which allow the basic coding scheme (Table 5.1), and its main summary measure, the left-right scale (RILE)—to accommodate new extensions and provide unchanging, comparable estimates across time and space, are paradoxically, ones for which it has often been criticized. We list such criticisms below, with comments.

1. Use of (quasi-)sentences as coding units

Sentences, or alternatively sentence-like arguments, are the basic unit of measurement in political and other discourse. More flexible and nuanced than individual words, they give a better representation of what is actually being said. Yet they are less sensitive to irrelevant changes in the spatial and temporal context. If particular words fall in and out of use, or change meaning (e.g. ‘gay’), (quasi-)sentences carry on regardless with the same word or its substitute. So far, however, no computerized coding of (quasi-)sentences has been devised. Using ‘Words As Data’ (Laver, Benoit, and Garry 2003) has advantages of reproducibility but needs additional information (expert judgements of party position or family membership) to carry out the data analysis. Words do not ‘speak’ on their own, so their analysis imports weaknesses from the outside information needed to kick-start it. Too sensitive to context, word-based estimates are also contaminated by weaknesses in their ‘trigger’.

2. ‘Human’, ‘hand’, or ‘manual’ coding

Often criticized for unreliability (in the narrow sense of perfect reproducibility of decisions), human coders are of course more aware of what (quasi-)sentences are really getting at, and hence more likely to discount trivial variation, and thus achieve greater validity than computers. This renders human coding properly invariant to irrelevant changes in temporal and spatial context.

3. General, invariant coding categories

These are often criticized for insensitivity to the specific country and temporal context—particularly by analysts who have chosen to confine themselves to a specific country and narrow time period (Laver, Benoit, and Garry 2003; Slapin and Proksch 2008; Gemenis, forthcoming). Such steamrolling of small national idiosyncrasies may however facilitate broad comparative analyses—provided of course they produce valid results.

Invariant categories which national nuances have to be pushed into, also allow coding to proceed independently on each text as it comes into the dataset. The category does not itself change with each new addition, unlike an inductive computer dictionary or scaling.

This then permits new collections of manifestos such as the Latin American to be incorporated in the comparative dataset without changing the old estimates. One simply could not run an expanding dataset without the ability to take in documents one by one.

4. A holistic, invariant left-right scale (RILE)

Much fire has been concentrated on RILE for not confining itself to pure left and right emphases in the data (Lowe et al. 2011; Benoit et al., forthcoming; Gemenis, forthcoming; but see Budge and McDonald, forthcoming). This, it is said, creates a 'centrist bias' in terms of non-left-right or even uncoded categories entering into the scoring of positions. 'Systematic bias' to the centre clearly fails as a criticism given the use of our estimates to correct all the other measures (Chapter 2). The great merit of inclusiveness is to create a holistic summary of the whole manifesto and its political tendencies which allow us to make an easy transition from its analysis to the whole dataset. Being invariant and a priori, its scale scorings can be calculated as manifestos come in to MPD_b and do not need wholesale adjustment with each bit of new information.

If the approach works—and it is indeed essential to deal with the uniquely expanding data and extensions like the Latin American—why then change or substitute it? Why not exploit it to its generous and yet unexplored limits in the service of comparative theory building and testing? That is what we would urge all our readers to do, building on the extensive documentation provided in this book and its predecessor to settle quibbles about quality, scope, and reach.

NOTES

1. However, earlier research (Robertson 1976; Budge and Farlie 1977) has provided a basis for extending the British and US estimates back to 1920.

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Handbook for Users and Coders of the

Scope, Range, and Extent of Manifesto Project Data Usage (SRE)

Dataset

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Abstract

Scope, Range, and Extent of Manifesto Project Data Usage (SRE) is a content analysis of publications that use the Manifesto Project's Database (MANIFESTO Database), its resulting dataset, and this handbook for users and forthcoming coders. Up to now, a total of 273 articles published between 2000 and the first semester of 2015 in eight high-impact journals (American Journal of Political Science, American Political Science Review, British Journal of Political Science, Comparative Political Studies, European Journal of Political Research, Electoral Studies, The Journal of Politics, and Party Politics) have been coded according to a 140-variables scheme. The SRE dataset, which includes literature reference files divided in methodological and substantial ones, offers a condensed but exhaustive overview over topics, policy dimensions, and extraction methods used in each article. Besides, the range of countries, party types and families, times, and actors are covered. Furthermore,

the extent of critique, validation, and reliability testing related to the MANIFESTO Database is reviewed. Thus, the SRE dataset provides old and new users of the MANIFESTO Database with a quick and convenient summary of existing research and shows different ways in which these data can be used. Moreover, the SRE dataset could be useful to those looking for information on methodology or case studies on certain countries. Finally, this handbook offers key information both users and coders of the SRE dataset.

Table of contents

I.	<i>Introduction.....</i>	4
II.	<i>Variables and categories.....</i>	7
III.	<i>General coding rule.....</i>	23
IV.	<i>How to add your own publications to the SRE dataset.....</i>	24
V.	<i>Bibliography.....</i>	26

I. Introduction

Scope, Range, and Extent of Manifesto Project Data Usage (SRE) comprises a content analysis of publications that use the Manifesto Project's Database (MANIFESTO Database), the resulting dataset, and this handbook for users and forthcoming coders.

SRE has systematically reviewed the usage of the MANIFESTO. Since the beginning of the Manifesto Project some 40 years ago (Robertson 1976), substantive research based on the MANIFESTO Database as well as methodological research addressing its data collection has been growing explosively. Responding to this noticeable increase in usage, the SRE dataset and the accompanying data and literature reference files provide first and foremost a quick and convenient overview on existing research for new data users. Notwithstanding, this is not

the sole purpose of SRE. We encourage users of the MANIFESTO Database to add their own Manifesto research outputs to the SRE database in order to allow for a better communication and exchange between users. Should our review data be in demand, we consider to update the current selection of publications and to extend it to other journals and books.

The *SRE dataset* covers all publications between the beginning of 2000 and the first semester of 2015 issued in the following eight journals:

1. *American Journal of Political Science* (AJPS)
2. *American Political Science Review* (APSR)
3. *British Journal of Political Science* (BJPS)
4. *Comparative Political Studies* (CPS)
5. *European Journal of Political Research* (EJPR)
6. *Electoral Studies* (ES)
7. *The Journal of Politics* (JP), and
8. *Party Politics* (PP)

It is worth noting that all journals have high impact and focus on political parties and party systems.

We followed a two-step procedure for sampling the up-to-date coded articles. Firstly, we conducted a keyword search in the full text and the references from all articles published on the eight journals' websites. The keywords we were looking for were the three Mapping Policy Preferences books, which are the key references of the Manifesto Project, and citations of the current MANIFESTO Dataset. In addition to that, we browsed all articles with keywords that are project related, such as "CMP" and "Manifesto Project." Those two search criteria ensure that we have captured everything related to the Manifesto Project issued in the eight journals from 2000 onwards.

Secondly, as not all of these articles actually make use of the data, we included a coding variable that further divides the dataset into articles that use MANIFESTO data, those that only refer to it, and those that do not use the data but focus on the Manifesto Project approach (mostly critical judgements of basic features of the project).

Apart from the identification variables (V1 to V5) and the citation variables (V150 to V159) we distinguish three areas of usage: 1) scope of research topics, policy dimensions, and extraction methods (V6 to V17); 2) range of countries, party types and families, times, and actors (V18 to V28); 3) extent of critique, validation, and reliability testing (V29 to V140).

II. Variables and categories

Variable ID	Variable name	ID of variable categories	Category name	Variable and category description
<i>0. Article citation¹</i>				
V150	<i>Publication Year</i>			<i>= V3</i>
V151	<i>Author</i>			<i>Surname, name.</i>
V152	<i>Title</i>			<i>Title of the article.</i>
V153	<i>Publication Title</i>			<i>Title of the journal.</i>
V154	<i>ISSN</i>			
V155	<i>DOI</i>			
V156	<i>Abstract Note</i>			
V157	<i>Pages</i>			
V158	<i>Issue</i>			
V159	<i>Volume</i>			
<i>1. Identification variables</i>				
V1	<i>Running ID of the publication</i>			<i>Key ID of the publication</i>

¹ We included the citation variables at a late stage of the project. That is why they were included as V150–V159. Nevertheless, they go hand in hand with the identification variables (V1–V5) and are therefore the first to be listed in this overview and in the dataset. Beginning with V1, the variables are ordered by their variable ID.

				(Journal ID and two-digit running number for each article).
V2	Journal	1	AJPS	
		2	APSR	
		3	BJPS	
		4	CPS	
		5	EJPS	
		6	ES	
		7	JP	
		8	PP	
V3	Year of publication			
V4	Type of publication	1	Mainly substantive	Some of those articles may have methodological insights as well.
		2	Mainly methodological	Some of those articles may have substantive implications, if there is any specific area of research, code it!
V5	Dataset usage	1	Usage of data and aspects (see V21, V22, V29)	Aspects include party family codes, election dates, strength of parties (see V21), and modifications (V29 = 7,

				V71, V72) – to be coded, otherwise see V5 = 2.
		2	No usage of data but focus on MARPOR	If V5 = 2, code only V1–V5, V6 + V8 topic, V17 satisfaction, V29 if = 9.
		3	Referred to/used as background information	Rule for V5 = 2 applies.

All the following variables include zero for 'not mentioned/unspecified/does not apply'

II. Scope of approach

V6	Major substantive goal			If applicable, also to be coded if V4 = 2; in case both 2 and 3 apply, 3 beats 2.
		1	Descriptive	
		2	Hypotheses testing	
		3	Theory development	Includes concept development.
V7	Type of preference	1	Party preferences	Do not forget the coding rules!
		2	Policy preference	
		3	(Issue, policy, party) positions	
		4	Saliencies/emphasis	
		5	Saliencies and positions	

		6	<i>Ideologies</i>	
		7	<i>Valence issues</i>	
		8	<i>Topics</i>	
		9	<i>Programmatic heterogeneity/homogeneity</i>	<i>Includes programmatic cohesion.</i>
		10	<i>Policy domains and areas</i>	
		11	<i>Agendas</i>	
		12	<i>Pledges, promises</i>	
V8	<i>Substantive topic of research</i>	1	<i>Party competition</i>	<i>Do not forget the coding rules!</i>
		2	<i>Party strategies</i>	
		3	<i>Party positioning</i>	<i>Includes shifts (see V10).</i>
		4	<i>Policy alternatives</i>	
		5	<i>Policy agenda</i>	
		6	<i>Party politicization</i>	
		10	<i>Intra-party politics</i>	
		11	<i>Party/government durability</i>	
		12	<i>Party factions</i>	
		13	<i>Electoral performance</i>	<i>Includes electoral entry.</i>
		20	<i>Effects of election laws/of electoral reforms</i>	
		21	<i>Turnout</i>	
		22	<i>Economic voting</i>	<i>Includes social policy voting.</i>
		23	<i>Electoral cycles</i>	

	24	Class voting	
	30	Voter-party relationships	Includes issue congruence.
	31	Median voter-median party/government congruence	Includes median mandate; median voter's ideology.
	32	Cleavages/social divisions	Includes mass-level polarization.
	33	Gender politics and policies	Includes representation of women.
	40	Parties and civil society	
	41	Social movements/protest events	
	42	Partisan legitimacy	
	43	Political action	By parties and interest group/unions.
	50	Media analysis	
	60	Party-legislation relation	
	61	Legislators' voting behavior	
	70	Coalition politics	
	71	No-confidence movements	
	72	Party government positions	
	76	Fulfilment of pledges	
	77	Legislation	
	78	Treaty ratification (also with regard to the EU)	
	79	Issue evolution	

		80	EU affairs	EU politics, policy and polity, includes Europeanization.
		81	Globalization	
		82	Decentralization/regionalization/devolution	
		90	Agenda-setting	
		91	Policy making	For policy making/decision taking in general.
		92	Expenditures/budgets	For all expenditure/budget categories in comparison.
		93	Policy outputs	For policy outputs in comparison.
		94	Political economy	Includes economic performance; financial markets.
		95	Welfare-state policies	Includes redistribution.
		96	Pension policies	95 to 102: special policy areas receive a separate code.
		97	Childcare policies	
		98	Environmental policies	
		99	Immigration policies	

		100	Tax policies	
		101	Defense policies	Includes defense spending.
		102	Labor policies	
		103	Dissolution theories	
		104	Bureaucratic delegation	
		105	Gender and party leadership	
		106	Corruption	
		107	Climate	
		108	Styles of representation	
		110	Party system polarization	
		999	Several topics	
V9	Distances between parties' preferences measured?	1	Yes	Includes alternatives, variances, ranges, polarization of party systems, and diversity between parties and government parties.
V10	Change in preferences measured?	1	Shifts/movements	Only if actual measures are computed.
		2	Moving averages	Only if actual measures are computed.
V11	Multi-dimensionality		Number of dimensions	If more than three dimensions, note the first three mentioned!
		99	divers/many	Multi-dimensionality

				such as portfolios, policy areas, categories of legislation, etc.
V12	Policy dimension 1	1	Left-right	
		2	Economic	
		3	Environmental issues	
		4	Agriculture	
		5	Law and order	
		10	Socio-economic	
		11	Social justice	Social policies.
		12	Welfare	Includes redistribution, welfare, and education.
		13	Labor issues	
		14	Education	
		15	Spending and taxation	
		16	Civil rights	
		20	Progressive-conservative/GAL-TAN, societal	
		21	Religious cleavage	
		30	Multiculturalism	
		31	Immigration	
		32	Ethnic/ethnic minority issues	
		40	Center-periphery cleavage	Includes decentralization.
41	European integration, Europeanization			

		42	Defense, external security	
		43	Foreign policy	
		44	Culture	
		45	Interior	
		50	Constitutionalism	
		51	Corruption	
		52	Extreme right issues	
		60	Inclusiveness of parliamentary representation	
		61	Corporatism	
		99	Diverse	More than one topic.
V13	Policy dimension 2			See V12!
V14	Policy dimension 3			See V12; if more than 3 dimensions are analyzed, take the order in which they are mentioned.
V15	Extraction method	1	RILE	Laver/Budge (1992); Powell (2009); rescaling 1-100.
		2	Deductive classification; fixed across cases	
		3	Logit scaling	Lowe et. al. (2011).
		4	Franzmann/Kaiser (2006)	
		5	Factor analysis: principal components	

		6	Factor analysis: vanilla	Gabel/Huber (2000).
		7	MDS – multidimensional scaling	
		8	RILE + deductive classification	
V16	Number of variables			Only variables taken from MARPOR (not authors' variables).
V17	Satisfaction with data	1	Does work for the topic	Only concerning MARPOR data usage.
		2	Does not work for the topic	Only concerning MARPOR data usage.
<p><i>III. Range of approach</i></p> <p><i>A. Actors:</i></p>				
V18	Actor type	1	Parties	
		2	Party coalitions	
		3	Party governments	
		4	Median party	
		5	Median voter	
		6	Median voters and median parties	Includes district medians and the MP's party (SMD).
		7	Parliamentarians/legislators	
		8	Median legislator	
		9	Party systems	Electoral and

				parliamentary.
		10	EP party groups	
		11	EU member states	
		12	EU commission	
		13	Parties and governments	
		14	Government and opposition	
		15	EU MEPs	
		16	Voters and governments	
		17	Executive and legislative	
		18	Parties and party systems	
V19	Party type	1	Clientele parties	Includes the comparison to programmatic parties.
		2	Cartel parties	
		3	Catch-all parties	
		4	Populist parties	
		5	Niche parties	
		6	Mainstream parties	
		7	Luxury parties	
		8	Big parties	
		9	Redistributive parties	
		99	Diverse	
V20	Party family	1	Green-alternative parties	
		2	Communist parties	
		3	Social democratic parties	
		4	Liberal parties	

		5	Religious	
		6	Conservative	
		7	Radical right	
		8	Regional	
		9	Special issue	
		10	Anti-European	
		11	Ethnic minority	
		12	Radical left	
		99	Party families in comparison	
<i>B. Texts:</i>				
V21	Party program data	1	Party preference data used	
		2	Party family codes used, only	
		3	Election dates used, only	
		4	Strengths of parties used, only	
		5	Lengths of programs used, only	
V22	Government declaration data	1	Government declaration data used	
<i>C. Countries:</i>				
V23	Number of countries covered		1-58	Consider only countries that are included in the

				MARPOR dataset:
V24	Region covered			To be coded for cross- as well as for single-country analysis, the different regional categories include the respective main suspects (countries) of political science. Only rough coding necessary for researchers to find information on special regions, not single countries.
		1	Western Europe	
		2	Central and Eastern Europe	
		3	Western and Central and Eastern Europe	
		4	EU	Independent of the accession date.
		5	OECD members	Advanced industrialized democracies.
		6	All countries in the dataset	Almost all, more than OECD.
		7	Latin America	

D. Times:

V25	First year (election) covered			
V26	Last year (election) covered			
V27	Number of years			
V28	Number of elections			

IV. Extent of approach

V29	Major methodological goal	1	Reliability testing of MARPOR	1-9 specified in V29-V140
		2	Validation of MARPOR	Includes descriptions of the methodological approach (visual validity).
		3	Cross-validation	
		4	Triangulation	Triangulation can be used also in cases where the term is not explicitly mentioned but more than one approach is used for estimating preferences.
		5	Introduction/use of an alternative method	

		6	Transfer of MARPOR to other text type	Means that the classification scheme is used for another text type without much difference in the categories.
		7	Modification of MARPOR	Means that the approach is taken, but the classification scheme may be quite different.
		8	Match/merging of MARPOR to other dataset	To be used if V4 = 1; when V4 = 2, other entries for V29 may also be important.
		9	Critique of MARPOR	

Attention: the variables listed below under (1) to (9) are the ones occurring most often for (1) to (9). However, any combination is possible, for example: Cross-validation is mostly done across basic approaches, but can also be applied across estimates based on MARPOR. In addition, the variables listed under (1) to (9) are not exclusive. All items occurring in a publication are coded. Therefore, the lists (1) to (9) are rather a systematic overview:

If V29 = (1) type of reliability testing:

V30	Intra-coder reliability			
V31	Inter-coder reliability			
V32	Hausman/Gulikson/McDonald			

	measurement			
V33	Variance model			
V34	Regression model			
V35	Sensitivity analysis			
<i>If V29 = (2 or 3) type of Validation: see also V102 to V132</i>				
V40	Visual inspection	1	Face validity	
		2	Fits historical record.	
		3	Plausible results	
		4	Fits with other policy measures.	
		5	Result as theoretically expected	
V41	Construct and conceptual validity			
V42	Convergent validity			
V43	Rank order Rho			
V44	CCA (canonical correlation coefficients)			
V45	MTMM (multitrait-multimethod)			Campbell/Fiske (1959).
V46	External validation			
<i>If V29 = (3, 4, or 5) cross-validation/triangulation/alternative method:</i>				
V50	Expert judgments			
V51	Wordscore		V51 + V52 = one variable = automated approaches	

V52	Wordfish			
V53	Crowd-coding			
V54	Public opinion surveys			
V55	MP-data			
V56	MEP-data			
V57	Content analysis other than MARPOR			
V58	Media data			
V59	Elite data			
<i>If V29 = (6) text type:</i>				
V60	European programs			
V61	Regional programs			
V62	Investiture debates			
V63	Speeches of the throne			
V64	Motions in party congresses			
V65	Budget speech			
<i>If V29 = (7) type of modification:</i>				
V70	Specifications for other levels of decision taking			
V71	Specifications of (different) specific policy issues			
<i>If V29 = (8) match/merging of MARPOR data with:</i>				<i>For 80-89: 0 - no</i>

				merging 1 - national 2 - EU 3 - international 4 - local/regional 5 - national and regional 6 - national and EU
V80	Voter data			Individual level data, including citizens.
V81	Electoral data			Because data on votes and seats at the national level are included in the MARPOR dataset, this category applies to national data such as the disproportionality of the electoral system, to EU data such as membership in the EU.
V82	Media data			
V83	Coalition and government data			Includes portfolio

				distribution among the coalition parties, information on ministries, and elected offices.
V84	Socio-economic data			I.e. GDP.
V85	Public policies/outputs			
V86	Legislation			Includes proposals, ratifications.
V87	Expenditures			
V88	Party data			Includes leadership.
V89	Presidential data			Includes heads of state in parliamentary systems.
V90	Contextual data			Institutional variables such as bicameralism, decentralization.
V91	Tax data			
V92	Legislature			Data on parliamentarians.
V93	Market data			Stock markets.
V94	Experts' data			

If V29 = (9) key aspects of critique on four levels of comparison: 1 = critique, 2 = validation (mostly by MARPOR members); including weaknesses of program-based approach.

<i>(1) Across estimates based on MARPOR data:</i>				
V101	RILE			
V102	Other left-right measures than RILE			
V103	Uncertainty measure	1	Missing	
<i>(1.a) Alternatives suggested: (Attention to change in logic for V104 - 107: 1 = alternative is criticized. 2 = alternative is suggested).</i>				
V104	Bootstrapping			Benoit et al. (2009).
V105	Weight by length			Length of manifesto.
V106	Bayesian approach			
V107	Logit ratio			Lowe et. al (2011).
<i>(1.b) MARPOR measures:</i>				
V108	Residuals			Of time-series models.
V109	4% shift			
V110	Category selection			That is, the difficulty to validly select categories for scaling.
<i>(2) Across text-based approaches:</i>				
V111	Proxy documents			See suggested solutions: V107!

V112	Short documents			See suggested solutions: V107!
V113	Missing countries			Presidential systems; developing countries.
V114	Unitizing			
V115	Classification			That is, the coding scheme.
V116	Relative salience/saliency approach			
V117	Content of programs			Random/stochastic character.
V118	Centrism bias			
V119	One value per period			Ignores all changes during legislative periods.

(3) Across basic approaches: MARPOR compared to expert judgments, surveys

V121	Volatile versus stable positions			Over-time comparison.
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(4) Across estimates to model the representative process

V131	Measurement of median voters			Includes the median voter-median party relation.
V132	Measurement of government			For example, partisan

	<i>position</i>			<i>veto player distance.</i>
V133	<i>Measurement of median parties</i>			
V134	<i>Measurement of median faction's position</i>			
V140	<i>Summary of critique</i>	0	<i>None mentioned</i>	
		1	<i>Some drawbacks</i>	
		2	<i>Complaints/more critical than positive remarks</i>	
V141	<i>MARPOR membership</i>	0	<i>No membership of the working group</i>	
		1	<i>Membership of the working group</i>	<i>Includes the authors of MPP1 and MPP2.</i>
V142	<i>Noteworthy solutions</i>			<i>Includes central concepts of respective research that haven't been caught by the former variables.</i>

III. General coding rules

The general rules, which primary coders established and followed while coding the articles currently included in the SRE dataset, are the following:

1. We coded only information that is explicitly mentioned in the text. For instance, if a scholar said she or he had been focusing on party strategy but the coder was convinced that the research is more about party positioning, variable 8 “substantive topic of research” would still be coded as “2” (party strategies).
2. In case of doubt on which category of a variable applies, we coded what was stated in the paragraph where the dataset usage was described, in the keywords, the title, the abstract, hypotheses, graphs, or figures (in that order of decision making). This rule would for example be applied when the author uses both “party strategy” and “party positioning” (see V8).
3. If two codes applied according to rule number 2, we coded the dependent variable.

IV. How to add your own publications to the SRE dataset

We encourage authors to add their research using or referring to the Manifesto Project to the SRE dataset. That also includes papers published in journals not covered by SRE.

As research evolves, there may be new research fields and topics not yet included in the category scheme. Please feel free to add categories to the original SRE scheme if they are missing. In that case, we would ask you to contribute to updating the SRE handbook by sending us a copy of your extended version comprising the new categories, which will be published on MARPOR's homepage.

For adding your own publications please follow these steps:

- 1. Get familiar with SRE's coding variables and categories.*
- 2. Code your paper (Excel, Stata).*
- 3. Add new categories to variables if necessary.*
- 4. Update this handbook.*
- 5. Send your code file and – if it has been updated – the handbook to: manifesto-communication@wzb.eu.*

The Manifesto Project team will add your coding and the updated handbook to SRE.

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Manifesto Coding Instructions (5th revised edition), March 2014

INTRODUCTION: CMP AND THE PURPOSE OF THIS HANDBOOK.....	2
1. THE MANIFESTOS	2
1.1 WHICH PARTIES?	2
1.2 WHICH PRESIDENTIAL CANDIDATES?	2
1.3 COLLECTION OF MANIFESTOS	3
1.4 HOW TO FIND THE MANIFESTOS	3
1.4 FILLING IN THE MANIFESTO INFORMATION TABLE FOR EVERY CODED ELECTION	4
2. PREPARATION: THE TRAINING.....	4
2.1 PURPOSE OF TRAINING	4
2.2 PROCESS OF TRAINING.....	4
2.2.1 <i>Communication with the Supervisor</i>	4
2.2.2 <i>Reading the Handbook</i>	4
2.2.3 <i>Taking the Tests and Receiving Feedback</i>	5
3. A TWO-STEP PROCESS: UNITISING AND CODING – BASIC RULES	5
3.1 WHICH PARTS OF A MANIFESTO SHOULD BE UNITISED AND CODED?	5
3.2 UNITISING – CUTTING TEXT INTO QUASI-SENTENCES	6
3.2.1 <i>When to Cut Sentences</i>	6
3.2.2 <i>When Not to Cut Sentences</i>	6
3.3 BOTTOM-UP APPROACH TO CODING – FINDING THE RIGHT CODE FOR A QUASI-SENTENCE.....	7
3.3.1 <i>The Categories</i>	7
3.3.2 <i>The Subcategories</i>	9
3.3.3 <i>The Code Allocation</i>	9
4. SPECIFIC PROVISIONS - RULES TO KEEP IN MIND	12
4.1 RARE OCCASIONS: WHEN TO USE THE '000' CATEGORY	12
4.2 CATCH-ALL CATEGORIES	12
4.3 AGRICULTURE	12
4.4 SUB-CATEGORIES FROM PRIOR PROJECT PHASES.....	12
4.5 BACKGROUND KNOWLEDGE VS. PERSONAL BIAS.....	13
5. IN CASE OF QUESTIONS AND QUERIES.....	14
MANIFESTO INFORMATION	15
CATEGORY SCHEME.....	16
PROCEDURE FOR TRAINING AND ENTRY TEST	28
TRAINING TEST	29
ENTRY TEST.....	35

Introduction: CMP and the Purpose of this Handbook

This is the handbook for the Manifesto Project (CMP/MARPOR), which provides the Manifesto Project coders with an introduction on how to apply the rules and definitions which constitute the data production process of the project. CMP's objective is to measure policy positions of all relevant parties competing in any democratic election in the post-World-War-II period for the following countries: OECD and EU members, Central and Eastern Europe, Latin America and (in the future) South-East Asia. Furthermore, the Manifesto Project strives to measure the policy positions of presidential candidates in Latin America. Analysing manifestos allows for measurement of party and presidents' policy positions across countries and elections within a common framework. Manifestos are understood to be parties' only and presidential candidates' main authoritative policy statements and, therefore, as indicators of the parties' policy preferences at a given point in time. For this reason, manifestos are chosen as the subject for quantitative content analysis.

This content analysis aims to discover party and presidential stances by quantifying their statements and messages to their electorate. A unified classification scheme with an accompanying set of rules was developed to make such statements comparable. This handbook provides coders with all of the relevant information, definitions, and sources needed to apply the coding scheme to their respective countries.

1. The Manifestos

Manifestos are chosen for the basis of this research from the various types of party- or candidate- issued documents. The British label 'manifesto' refers to what the rest of the world dubs 'election program,' i.e., a text issued by political actors on the occasion of elections in order to raise internal and/or external support. For the purposes of this handbook, the term "manifesto" is defined as text published by a political party or presidential candidate in order to compete for votes in national elections.

1.1 Which Parties?

The Manifesto Project aims to measure the policy preferences of each relevant party running in an election which is included in the data collection. Relevant parties are defined as those parties that win seats in their respective election. For Central and Eastern Europe and Latin America, every party winning at least two seats is included in the data collection process. All coders hired by MARPOR will receive a list of parties for whom manifestos (or their substitutes) have to be coded. Coders are asked to propose corrections or amendments to the list if necessary.

1.2 Which Presidential Candidates?

Similarly, the Manifesto Project seeks to include the relevant candidates in Latin American presidential elections to its database in order to, e.g., allow for comparisons with 'their' parties, the party competition in general or

analyses of different representation mechanisms. Relevant presidential candidates are defined as candidates receiving at least 5% of votes in the first round of the election.

In some cases, parties and presidential candidates run on the same manifestos. In these instances the manifesto is collected and coded only once and the positions assigned to both political actors. These cases are specially marked in the dataset.

1.3 Collection of Manifestos

In most cases, coders are asked to collect the manifestos for the elections they are to code.

While the definition of ‘manifesto’ presented above may initially seem straightforward, manifestos can vary considerably across parties, elections, countries, and years. The title of a manifesto can differ considerably, from ‘Election Program of Party X’, ‘Program’, ‘Platform’ or ‘Action Intentions’ to statements such as ‘We will make Australia prosper’. Furthermore, in the event that parties or presidential candidates provide more than one version of a manifesto, whether a long and a short version or several otherwise different versions of the manifesto, all versions need to be collected and sent to the supervisors. This is also true for instances where the party or presidential candidate provides a machine-readable version (i.e. in doc or html format), a digital version (i.e. in pdf format), and/or a colour hard-copy including pictures. The ideal type of manifesto is the machine-readable format and should be collected whenever possible. For documentation reasons, however, the project also needs at least one fully formatted version of the manifesto, which is usually either in pdf or hard-copy format. If the former is not available, the latter is sufficient.

1.4 How to Find the Manifestos

The manifestos can often be gathered from the parties or presidential candidates themselves and in particular their websites, special election newspapers of parties and/or regular newspapers. Furthermore, sources might be research and training institutes or publications, e.g. books with collections of programs, associated with the parties or presidential candidates. If manifestos are not freely available, coders are asked to contact the party or presidential candidate. In all cases, the ideal, machine-readable manifesto should be retrieved when possible.

In cases when no manifesto is available, this should be reported back to the supervisors immediately. For instance, the only texts available may be newspaper summaries as a condensed form of the parties’ or presidential candidates’ election pledges. Sometimes, only reports of party spokesmen about policy preferences and goals for the upcoming legislature may be available. In case only such documents are available, all available information needs to be collected very carefully under the supervision of the training supervisor.

1.4 Filling in the Manifesto Information Table for Every Coded Election

When providing the original manifestos to the supervisors, coders are asked to fill in one manifesto information table (see p. 15) for each election for which coders have collected manifestos. This information is crucial for the Manifesto Project team to be able to manage and collect all necessary secondary information.

2. Preparation: The Training

All coders must take part in training before they are allowed to start the production coding, i.e. coding real manifestos. Coders who have already coded actual elections need to retake the training every two years in case of uninterrupted production coding or whenever they have not engaged in production coding for more than six months.

2.1 Purpose of Training

Of central concern to this coding procedure is the comparability of results. Hence, in principle, every coder should make the same decisions concerning the unitising and coding of any given manifesto. To ensure comparability, the project has defined a set of coding rules that all coders should follow. The training assures that all coders have a sufficient understanding of the coding process, enabling them to create reliable and comparable data.

2.2 Process of Training

In order to ensure maximum reliability and comparability of data, the training process is based on intensive communication between the prospective coders and the supervisor within the Manifesto Project team. Within this process coders learn how to code party manifestos, in particular how to deal with the coding scheme and which rules apply under which circumstances. Thus, coders learn the rules and gain valuable initial insight into the coding process.

2.2.1 Communication with the Supervisor

The core of this training is the close communication between coders and the training supervisor. Within the Manifesto Project team, there is always one scholar who acts as training and coding supervisor. This supervisor administers the training and helps coders with any problems during the training and the production coding phase. These problems might range from questions regarding rules or definitions to single sentences with which coders have problems. Whenever coders need any advice or clarification, they are urged to contact the supervisor. The training and coding supervisor is currently Annika Werner (annika.werner@wzb.eu).

2.2.2 Reading the Handbook

The basis of the training process is this handbook. The instructions must be studied thoroughly and followed closely. It is important to highlight that it is not sufficient to simply look at the handbook once. Coders should read the handbook several times and try to commit all coding rules and definitions of

categories to memory as much as possible. The more coders can memorize, the faster the production coding will be.

2.2.3 Taking the Tests and Receiving Feedback

Central features of the training process are the successful completion of two tests by every coder: one training test and one entry test. The training procedure is as follows:

- 1) After examining the handbook, coders code the first training test and send it to the supervisor via email.
- 2) The supervisor sends extensive feedback on the training test.
- 3) Coders code the second test—the entry test—and send it to the supervisor.
- 4) The supervisor decides on the basis of the quality of coding whether coders have sufficient understanding of the coding process to begin production coding. With the decision that coders should a) commence production coding or b) receive more training, the supervisor sends feedback on the entry test to coders.

If necessary, each test can be taken twice.

3. A Two-Step Process: Unitising and Coding – Basic Rules

After coders have sent the original manifestos to the supervisor and have successfully completed the training, the supervisor provides coders with electronically codable versions of the manifestos. Coders are then asked to code this version of the manifestos.

The central question of manifesto coding is: **What message is the party/presidential candidate trying to convey to voters? Which are the issues the party/presidential candidate regards as important?**

The decision-making process of coding is described in the following sections. This procedure comprises two steps: a) unitising (how many unique statements do parties make?) and b) coding (what kind of statements do parties make?).

3.1 Which Parts of a Manifesto Should Be Unitised and Coded?

Each textual part of a manifesto needs to be unitised and coded. Some parts of the manifesto, such as chapter or section headings, statistics, and tables of content should not be considered as text. Introductory remarks by, e.g., party leaders should be similarly ignored. These parts, however, should not be deleted but instead kept for documentation purposes.

When preparing the manifesto for coding, the supervisor earmarks those parts of the manifesto that should be ignored. Coders are asked to code in accordance with this tagging procedure but also to check the decisions made by

the supervisor. If coders doubt whether certain parts of the manifesto should be treated as text or not, they should seek immediate advice from the supervisor.

3.2 Unitising – Cutting Text into Quasi-Sentences

The coding unit is a quasi-sentence. One quasi-sentence contains exactly one statement or “message”. In many cases, parties make one statement per sentence, which results in one quasi-sentence equalling one full sentence. Therefore, the **basic unitising rule** is that **one sentence is, at minimum, one quasi-sentence**. In no case can two or more sentences form a quasi-sentence.¹ There are, however, instances when one natural sentence contains more than one quasi-sentence, as discussed below.

3.2.1 When to Cut Sentences

Only if the natural sentence contains more than one unique argument should this sentence be split. There are two possibilities for unique arguments: 1) a sentence contains two statements that are totally unrelated; or 2) a sentence contains two statements that are related (e.g. they come from the same policy field) but address different aspects of a larger policy.

Clues to unique statements might be 1) semicolons; 2) the possibility to split up the sentence into a meaningful bullet point list; 3) general clues from codes. Regarding the third point, it is especially likely that the sentence includes two unique statements if a sentence contains codes from two or more domains (see Table 1, p. 6). An example would be:

“We need to address our close ties with our neighbours (107) // as well as the unique challenges facing small business owners in this time of economic hardship. (402)”

3.2.2 When Not to Cut Sentences

There are many instances when sentences should *not* be split into quasi-sentences. A good rule of thumb is that **one word** is most likely not a quasi-sentence. It is crucial to know that **examples, reasoning, explanations**, etc. are not unique arguments and are therefore no separate quasi-sentences.

Coders should also be careful when unitising based on sentence operators such as commas, colons, hyphens, etc. Such operators might be, but are not always, indicators of a quasi-sentence. Operators do not indicate two quasi-sentences if they do not separate two unique statements. Examples for this case are:

“The animal rights in our country must be improved; and we will do that. (501)”

“Our country’s budget must be put on solid footing again, no matter the costs. (414)”

Coders should not split up a sentence just because they think they have discovered a code. For instance, the mere singling out of another country is not

¹ The only known exception is Greek, where what is otherwise considered a sentence can span over commonly used signs for the end of a sentence, esp. full stops.

a unique argument and, therefore, a quasi-sentence. **Only if** the statement refers to a general or specific foreign policy goal should it be considered a separate quasi-sentence. Furthermore, references to policy areas such as education, agriculture, labour, and the environment should not automatically be separated simply because ‘catch words’ such as ‘schools’, ‘farmers’, ‘unions’ or ‘environmentalists’ are mentioned. Again, the sentence should only be cut if it is a statement about the issue. Here is an example of a sentence that seems to contain several arguments at first glance but, on closer inspection, is revealed to have only one unique message:

“We must force our unions to step back from their demands or their policies will result in the loss of thousands of jobs, closing of schools, and diminishing pensions. (702)”

In this example, jobs, schools, and pensions are only instances outlining the negative impact of what will happen if the party’s central demand (unions reducing *their* demands) is not met.

3.3 Bottom-Up Approach to Coding – Finding the Right Code for a Quasi-Sentence

3.3.1 The Categories

The Manifesto Project developed a category system whereby each quasi-sentence of every manifesto is coded into one, and only one, of 56 standard categories. The 56 categories are grouped into seven major policy areas and are designed to be comparable between parties, countries, elections, and across time. Furthermore, 12 categories are split up into 2 or more subcategories that capture specific aspects of these categories. In these cases, the coder needs to choose between the subcategories and may not use the main category.

Table 1: Categories and Subcategories in Seven Policy Domains

Domain 1: External Relations

- 101 Foreign Special Relationships: Positive
- 102 Foreign Special Relationships: Negative
- 103 Anti-Imperialism: Positive
 - 103.1 State Centred Anti-Imperialism
 - 103.2 Foreign Financial Influence
- 104 Military: Positive
- 105 Military: Negative
- 106 Peace: Positive
- 107 Internationalism: Positive
- 108 European Integration: Positive
- 109 Internationalism: Negative
- 110 European Integration: Negative

Domain 2: Freedom and Democracy

- 201 Freedom and Human Rights: Positive
 - 201.1 Freedom
 - 201.2 Human Rights
- 202 Democracy
 - 202.1 General: Positive
 - 202.2 General: Negative
 - 202.3 Representative Democracy: Positive
 - 202.4 Direct Democracy: Positive
- 203 Constitutionalism: Positive
- 204 Constitutionalism: Negative

Domain 3: Political System

- 301 Decentralisation: Positive
- 302 Centralisation: Positive
- 303 Governmental and Administrative Efficiency: Positive
- 304 Political Corruption: Negative
- 305 Political Authority: Positive
 - 305.1 Political Authority: Party Competence
 - 305.2 Political Authority: Personal Competence
 - 305.3 Political Authority: Strong government
 - 305.4 Former Elites: Positive
 - 305.5 Former Elites: Negative
 - 305.6 Rehabilitation and Compensation

Domain 4: Economy

- 401 Free Enterprise: Positive
- 402 Incentives: Positive
- 403 Market Regulation: Positive
- 404 Economic Planning: Positive
- 405 Corporatism: Positive
- 406 Protectionism: Positive
- 407 Protectionism: Negative
- 408 Economic Goals
- 409 Keynesian Demand Management: Positive
- 410 Economic Growth
- 411 Technology and Infrastructure: Positive

- 412 Controlled Economy: Positive
- 413 Nationalisation: Positive
- 414 Economic Orthodoxy: Positive
- 415 Marxist Analysis: Positive
- 416 Anti-Growth Economy: Positive
 - 416.1 Anti-Growth Economy: Positive
 - 416.2 Sustainability: Positive

Domain 5: Welfare and Quality of Life

- 501 Environmental Protection: Positive
- 502 Culture: Positive
- 503 Equality: Positive
- 504 Welfare State Expansion
- 505 Welfare State Limitation
- 506 Education Expansion
- 507 Education Limitation

Domain 6: Fabric of Society

- 601 National Way of Life: Positive
 - 601.1 General
 - 601.2 Immigration: Negative
- 602 National Way of Life: Negative
 - 602.1 General
 - 602.2 Immigration: Positive
- 603 Traditional Morality: Positive
- 604 Traditional Morality: Negative
- 605 Law and Order
 - 605.1 Law and Order: Positive
 - 605.2 Law and Order: Negative
- 606 Civic Mindedness: Positive
 - 606.1 General
 - 606.2 Bottom-Up Activism
- 607 Multiculturalism: Positive
 - 607.1 General
 - 607.2 Immigrants: Diversity
 - 607.3 Indigenous rights: Positive
- 608 Multiculturalism: Negative
 - 608.1 General
 - 608.2 Immigrants: Assimilation
 - 608.3 Indigenous rights: Negative

Domain 7: Social Groups

- 701 Labour Groups: Positive
- 702 Labour Groups: Negative
- 703 Agriculture and Farmers
 - 703.1 Agriculture and Farmers: Positive
 - 703.2 Agriculture and Farmers: Negative
- 704 Middle Class and Professional Groups: Positive
- 705 Minority Groups: Positive
- 706 Non-Economic Demographic Groups: Positive

000 No meaningful category applies

3.3.2 The Subcategories

Some of the categories above are further divided into two or more subcategories in order, in particular, to accommodate the specificities of the Latin American political competition. However, these subcategories should be used for all countries, without regard to the region. **If a category has such subcategories, the coder must only use the subcategories.** The main categories only remain as guidelines and for aggregation purposes, especially to enable the recreation of the original coding scheme. However, the coder does not need to type the full stop (.) that is displayed in the four-digit subcategory numbers.

3.3.3 The Code Allocation

The following questions are central to the decision making of assigning codes to quasi-sentences: **What are the statements of the party/presidential candidate? Which policy positions does the party/presidential candidate convey?** In order to make this decision, coders need to make sure that they understand what the party/presidential candidate says. Therefore, it is essential to read every singly quasi-sentence very carefully.

Often political actors are very clear in their statements and candidly say what they seek: more of one thing, less of another. In this case, assigning codes is straightforward: coders identify the message and assign the corresponding category. When consulting the category scheme it is important to keep in mind that the categories' definitions are not exhaustive. They are meant to give a general notion and some exemplary statements. The scopes of the categories are not constrained to the exact wording of the definition and it should be assigned to all issues that are related to the general idea conveyed.

There are, however, times when these statements are not very clear and are more difficult to code. When facing such an ambiguous sentence, the coders should always first think about the meaning of the quasi-sentence and double-check the quasi-sentence with **all** codes in the category scheme. This helps assure that the quasi-sentence does not simply fall into one of the lesser used, 'rare' categories.

In general, there are three possible factors which cause ambiguity: 1) *Language is often simply ambiguous.* Language is full of various styles, jargon, rhetorical meanings, colloquialisms, etc. Manifestos, therefore, often use language in manifold ways. 2) *Quite often political actors not only say what they want to achieve but also how they want to achieve it.* Sometimes, coders will find both statements within one natural sentence and will have to decide how to handle this high density of information. 3) *Many of the political issues included in manifestos are very complex and it is not possible to convey a clear message within one quasi-sentence.* Parties and presidential candidates often choose to build their arguments over several sentences, within a paragraph and/or sometimes even over the course of a whole chapter.

Coders need to keep these sources of ambiguity in mind in order to fully understand the message conveyed. The following section addresses ways for coders to handle 'ambiguous' language and other problems during the course of coding.

1) Ambiguity of Language

a) Often, political actors make policy statements by mentioning a negative aspect of an issue in order to highlight its importance. Take, for example, the following:

"Our country's democracy does not work well enough anymore!"

This sentence could be read and interpreted as a negative statement towards the country's democratic processes. However, it is rather clear that the party is not making a statement against democracy itself. The actual message of this sentence is one of concern about and criticism of the current state of democracy. Therefore, this is a positive statement towards the ideal principle of democracy.

b) Furthermore, political actors tend to use ambiguous or convoluted language to 'hide' certain statements often deemed politically incorrect or inadmissible viewpoints. Coders should try to understand the message while at the same time trying not to read too much into the quasi-sentence.

2) Ambiguity of Quasi-Sentences because of Complexity - A Hierarchy of Context

When the quasi-sentence in itself does not convey an obvious message despite coders' best effort to find one, several levels of context might be helpful to decide how to code a quasi-sentence. These levels are hierarchal. Coders should keep in mind that it is imperative to consider the context level closest to the quasi-sentence first and only move to the next level in case the closer one was not helpful.

The context levels are, in sequence from the quasi-sentence level upwards:

1. the rest of the sentence in case the quasi-sentence is only part of a natural sentence
2. the previous and the following sentences
3. the whole paragraph
4. the whole chapter or section
5. the whole manifesto
6. the political discourse concerning the issue in the country at the time of the election

3) Statements Containing Several Messages

Sometimes more than one code seems to apply to a quasi-sentence because the party or presidential candidate wraps several statements up into one broad statement. Quite often, these statements come in the form of "We want to reach A by doing B and C" or "We are doing B and C because we want to

reach A.” In principle, the grand rule of ‘code the message’ applies. For these two examples, the message is that A is primarily important. B and C are simply means to achieve A. **Goals usually take precedence over means when assigning codes.** The following example claims that changing the constitution might serve the purpose of promoting animal rights. Since the constitution change is clearly only a tool, this sentence is not cut into two quasi-sentences and only the animal rights code applies.

“To make sure that animal rights are universally recognised, we are going to add them to our constitution. (501)”

However, there are instances where this logic does not apply. It might be possible that the party not only sends a message for A but also puts so much emphasis on B and C that B and C become messages in themselves. This is most apparent when the quasi-sentence states that B and C are the only means possible and there is an imperative to use them: *“We want A therefore we must employ B and C as the only feasible options.”* The following example is one where the means (leaving NATO and reducing the military) are such strong messages in themselves that they need to be coded separately from the goal (peace).

“In order to achieve worldwide peace, (106) // our country must leave NATO (105) // and reduce the military to a minimum. (105)”

4) Statements Containing No Message

There are instances when a sentence by itself does not make a statement. Often, the context helps in these cases and the rules mentioned above still apply. A special case is when sentences are used as a way to introduce or end an argument, or to connect two arguments. These introductory, terminal, or connecting sentences do not constitute meaningful statements themselves but are part of a continuous argument. Therefore, they should be coded in the same category as the corresponding argument or as the bulk of the paragraph in which they appear.

5) Proximity of Contradicting Codes

Finally, a note of general caution: it is possible to have positive and negative codes on the same issue right next to each other. Manifestos often include contradictory statements. Coders should not try to assume ‘hidden’ meanings in a quasi-sentence just to make sense of the sentences around it. Manifestos are not codes to be deciphered. Instead, coders should be careful to only code what is written. The following examples are seemingly contradictory statements in close proximity:

We will support our troops overseas, (104) // while working to end the current war. (105)

Our constitution is a model for every truly democratic system (203) // but we need to change it (204).

4. Specific Provisions – Rules to Keep in Mind

There are several rules for the process of code allocation that stem from decades of experience with manifesto coders. There are certain habits and behavioural patterns which all coders (and especially new coders) should try to avoid. Therefore, while the following rules might seem trivial, coders are asked to keep them in mind.

4.1 Rare Occasions: When to Use the ‘000’ Category

Generally, coders should try to **use a meaningful code (101 to 706) whenever possible.**

However, there **are** instances when ‘000’ is an applicable code. The instances are: 1) the statement is totally devoid of any meaning and cannot be coded within the context; 2) the statement refers to a policy position that is not included in the category scheme. This may be particularly true for modern issues or if the category scheme only includes codes in one direction (positive or negative) and the statement refers to the non-included direction. For instance: environment is a positive category with no negative counterpart. If a statement can only be classified as “Environment Negative” it should be given a ‘000’ code. All quasi-sentences treated as uncodable must be rechecked after the program has been coded in its entirety.

4.2 Catch-All Categories

303, 305, 408 and the 700-categories (except 703, see below) are meant to be catch-all categories for general policies that do not fit any specific coding category. They should always be **avoided** if a more specific policy category can be used. However, this does not mean that they are forbidden. Coders should double-check the usage of these categories to make sure they have not missed a specific policy.

4.3 Agriculture

When agricultural issues are mentioned, coders often have the choice between 703 ‘Agriculture and Farmers’ and another, often economic, category. In these instances, a special rule applies: **If coders can choose between 703 or any other category, 703 should be chosen.**

However, this does not mean that the inclusion of the word ‘farmer’ automatically makes the category 703. This category should only be assigned if the statement is actually about agriculture and farmers and is positive.

4.4 Sub-Categories from Prior Project Phases

Apart from the sub-categories introduced in chapter 3.3.2 of this handbook, a set of sub-categories had been developed during prior phases of the Manifesto Project. These sub-categories dealt primarily with country specific issues of Central and Eastern European countries during the post-communist transition period. These sub-categories are still in existence, some of them have been incorporated into the category scheme presented above. The usage of all other, country-specific sub-categories should be avoided as much as possible.

To make sure that no sub-category is used unnecessarily, coders **must** contact the supervisor whenever they consider using any of the sub-categories from prior phases that are not part of the category scheme presented above.

4.5 Background Knowledge vs. Personal Bias

All coders are expected to be citizens of the country they code. We use citizen coders because they benefit from their background knowledge of their country. However, background knowledge should not be confused with a coder's personal characteristics, beliefs, and attitudes—all of which are potentially harmful to the comparability of coding.

Background knowledge is unique knowledge that only citizens of the country can have. It includes knowledge of the country's history, social problems and cleavages, electoral issues, party system, and party ideology. Personal biases, on the other hand, are coders' individual beliefs and attitudes concerning social and political issues, party ideologies, politicians and generally concerning what is 'right' and 'wrong'.

Coders should draw on background knowledge to help determine the code of ambiguous quasi-sentences only. However, coders should only do so if no other clues are available. In all cases, personal bias must be avoided! Such bias causes distortion. Coders should be especially careful when coding their most favourite and least favourite parties!

Furthermore, coders need to make sure that the statement is coded as it reads. If a party claims that their policy proposal has certain outcomes, this needs to be coded as it stands, even if coders think that these policies will lead to other or even opposing results. Again, the central focus of coding is to find out the policy positions and points of view of each party. Any personal judgements (of 'rightness' or 'wrongness', whether a statement is realistic or sensible, etc.) need to be avoided. The following sentence is a good example:

"We will increase the military expenditure to ensure peace in our region. (106)"

This sentence might sound incorrect but, nevertheless, the party is conveying the message that they want to improve the region's prospect for peace (106).

5. In Case of Questions and Queries

A trouble-shooting system exists for cases of questions and queries. The **contracting supervisor** (currently Pola Lehmann) needs to be contacted for any issues concerning manifesto collection, training, and coding contracts. The **database supervisor** (currently Sven Regel) can be contacted for any questions and problems concerning the technical side of dealing with manifestos, especially on how to work with the online platform. The **training and coding supervisor** (currently Annika Werner) needs to be contacted for any issues regarding the coding, whether questions about coding rules, code definition or any other issues. Coders might also discuss the coding of special issues, in particular country specific issues. Furthermore, coders may translate single sentences or paragraphs to obtain advice on how to deal with them. All communication processes run via email (manifesto-communication@wzb.eu) or through the new online platform (<http://manifesto-project.wzb.eu>). The coder is asked to indicate in the subject line to which supervisor the message is directed.

Manifesto Information

Election Year (yyyy):

Country Code:

Party Name in Original Language	International Party Name ²	Party Acronym in Original Language	Manifesto Title in Original Language	Manifesto Title in English Language	Source of Manifesto	Remarks

² Name the party is known internationally, which might be the original language or the English name.

Category Scheme

NOTE: Every negative category includes all references of the positive category but negative. For instance, 'Military: Negative' is the reversal of all 'Military: Positive' statements.

DOMAIN 1: External Relations

101 Foreign Special Relationships: Positive

Favourable mentions of particular countries with which the manifesto country has a special relationship; the need for co-operation with and/or aid to such countries.

102 Foreign Special Relationships: Negative

Negative mentions of particular countries with which the manifesto country has a special relationship.

These special relationships should be predetermined on a case by case basis. Refer to the supervisor for detailed information and attach a list of special relations to the coding protocol.

[103 Anti-Imperialism, comprised of:]

103.1 State Centred Anti-Imperialism

Negative references to imperial behaviour and/or negative references to one state exerting strong influence (political, military or commercial) over other states. May also include:

- Negative references to controlling other countries as if they were part of an empire;
- Favourable references to greater self-government and independence for colonies;
- Favourable mentions of de-colonisation.

103.2 Foreign Financial Influence

Negative references and statements against international financial organisations or states using monetary means to assert strong influence over the manifesto or other states. May include:

- Statements against the World Bank, IMF etc.;
- Statements against the Washington Consensus;
- Statements against foreign debt circumscribing state actions.

104 Military: Positive

The importance of external security and defence. May include statements concerning:

- The need to maintain or increase military expenditure;
- The need to secure adequate manpower in the military;
- The need to modernise armed forces and improve military strength;
- The need for rearmament and self-defence;

- The need to keep military treaty obligations.

105 Military: Negative

Negative references to the military or use of military power to solve conflicts. References to the 'evils of war'. May include references to:

- Decreasing military expenditures;
- Disarmament;
- Reduced or abolished conscription.

106 Peace

Any declaration of belief in peace and peaceful means of solving crises -- absent reference to the military. May include:

- Peace as a general goal;
- Desirability of countries joining in negotiations with hostile countries;
- Ending wars in order to establish peace.

107 Internationalism: Positive

Need for international co-operation, including co-operation with specific countries other than those coded in 101. May also include references to the:

- Need for aid to developing countries;
- Need for world planning of resources;
- Support for global governance;
- Need for international courts;
- Support for UN or other international organisations.

108 European Community/Union or Latin America Integration: Positive

Favourable mentions of European Community/Union in general. May include the:

- Desirability of the manifesto country joining (or remaining a member);
- Desirability of expanding the European Community/Union;
- Desirability of increasing the ECs/EUs competences;
- Desirability of expanding the competences of the European Parliament.

In Latin American countries: Favourable mentions of integration within Latin America, e.g CELAC, MERCOSUR, UNASUR. May include the:

- Desirability of the manifesto country joining (or remaining a member);
- Desirability of expanding or deepening the integration;

109 Internationalism: Negative

Negative references to international co-operation. Favourable mentions of national independence and sovereignty with regard to the manifesto country's foreign policy, isolation and/or unilateralism as opposed to internationalism.

110 European Community/Union or Latin America Integration: Negative

Negative references to the European Community/Union. May include:

- Opposition to specific European policies which are preferred by European authorities;
- Opposition to the net-contribution of the manifesto country to the EU budget.

In Latin American countries: Negative references to integration within Latin America,

e.g CELAC, MERCOSUR, UNASUR. May include the:

- Opposition to the manifesto country joining (or remaining a member);
- Opposition to expanding or deepening the integration.

DOMAIN 2: Freedom and Democracy

[201 Freedom and Human Rights, comprised of:]

201.1 Freedom

Favourable mentions of importance of personal freedom in the manifesto and other countries. May include mentions of:

- Freedom from state coercion in the political and economic spheres;
- Freedom from bureaucratic control;
- The idea of individualism.

201.2 Human Rights

Favourable mentions of importance of human and civil rights in the manifesto and other countries, including the right to freedom of speech, press, assembly etc.; supportive refugee policies.

[202 Democracy, comprised of:]

202.1 General: Positive

Favourable mentions of democracy as the “only game in town”. General support for the manifesto country’s democracy. May also include:

- Democracy as method or goal in national, international or other organisations (e.g. labour unions, political parties etc.);
- The need for the involvement of all citizens in political decision-making;
- Support for parts of democratic regimes (rule of law, division of powers, independence of courts etc.).

202.2 General: Negative

Statements against the idea of democracy, in general or in the manifesto country. Calls for reducing or withholding democratic rights from all or certain groups of people. Calls for the introduction or maintaining of a non-democratic regime, e.g. monarchy or rule of the military.

202.3 Representative Democracy: Positive

Favourable mentions of the system of representative democracy, in particular in contrast to direct democracy.

202.4 Direct Democracy: Positive

Favourable mentions of the system of direct democracy, in particular in contrast to representative democracy. This includes the call for the introduction and/or extension of referenda, participatory budgets and other forms of direct democracy.

203 Constitutionalism: Positive

Support for maintaining the status quo of the constitution. Support for specific aspects of the manifesto country’s constitution. The use of constitutionalism as an argument for

any policy.

204 Constitutionalism: Negative

Opposition to the entirety or specific aspects of the manifesto country's constitution. Calls for constitutional amendments or changes. May include calls to abolish or rewrite the current constitution.

DOMAIN 3: Political System

301 Federalism

Support for federalism or decentralisation of political and/or economic power. May include:

- Favourable mentions of the territorial subsidiary principle;
- More autonomy for any sub-national level in policy making and/or economics, including municipalities;
- Support for the continuation and importance of local and regional customs and symbols and/or deference to local expertise;
- Favourable mentions of special consideration for sub-national areas.

302 Centralisation

General opposition to political decision-making at lower political levels. Support for unitary government and for more centralisation in political and administrative procedures.

303 Governmental and Administrative Efficiency

Need for efficiency and economy in government and administration and/or the general appeal to make the process of government and administration cheaper and more efficient. May include:

- Restructuring the civil service;
- Cutting down on the civil service;
- Improving bureaucratic procedures.

Note: Specific policy positions overrule this category! If there is no specific policy position, however, this category applies.

304 Political Corruption

Need to eliminate political corruption and associated abuses of political and/or bureaucratic power. Need to abolish clientelist structures and practices.

[305 Political Authority, comprised of:]

305.1 Political Authority: Party Competence

References to the manifesto party's competence to govern and/or other party's lack of such competence.

305.2 Political Authority: Personal Competence

Reference to the presidential candidate's or party leader's personal competence to govern and/or other candidate's or leader's lack of such competence.

305.3 Political Authority: Strong government

Favourable mentions of the desirability of a strong and/or stable government in general.

305.4 Former Elites: Positive

Co-operation with former authorities in the transition period; amnesty for former elites; and 'let sleeping dogs lie' in dealing with the nomenclature.

305.5 Former Elites: Negative

Against former elite's involvement in democratic government; weeding out the collaborators from governmental service; for truth commissions and other institutions illuminating recent history.

305.6 Rehabilitation and Compensation

References to civic rehabilitation of politically persecuted people in the authoritarian era; references to juridical compensation concerning authoritarian expropriations; moral compensation.

Note: Specific policy positions overrule all subcategories of 305! If there is no specific policy position, however, these subcategories may apply.

DOMAIN 4: Economy

401 Free Market Economy

Favourable mentions of the free market and free market capitalism as an economic model. May include favourable references to:

- Laissez-faire economy;
- Superiority of individual enterprise over state and control systems;
- Private property rights;
- Personal enterprise and initiative;
- Need for unhampered individual enterprises.

402 Incentives: Positive

Favourable mentions of supply side oriented economic policies (assistance to businesses rather than consumers). May include:

- Financial and other incentives such as subsidies, tax breaks etc.;
- Wage and tax policies to induce enterprise;
- Encouragement to start enterprises.

403 Market Regulation

Support for policies designed to create a fair and open economic market. May include:

- Calls for increased consumer protection;
- Increasing economic competition by preventing monopolies and other actions disrupting the functioning of the market;
- Defence of small businesses against disruptive powers of big businesses;
- Social market economy.

404 Economic Planning

Favourable mentions of long-standing economic planning by the government. May be:

- Policy plans, strategies, policy patterns etc.;
- Of a consultative or indicative nature.

405 Corporatism/ Mixed Economy

Favourable mentions of cooperation of government, employers, and trade unions simultaneously. The collaboration of employers and employee organisations in overall economic planning supervised by the state.

406 Protectionism: Positive

Favourable mentions of extending or maintaining the protection of internal markets (by the manifesto or other countries). Measures may include:

- Tariffs;
- Quota restrictions;
- Export subsidies.

407 Protectionism: Negative

Support for the concept of free trade and open markets. Call for abolishing all means of market protection (in the manifesto or any other country).

408 Economic Goals

Broad and general economic goals that are not mentioned in relation to any other category. General economic statements that fail to include any specific goal.

Note: Specific policy positions overrule this category! If there is no specific policy position, however, this category applies.

409 Keynesian Demand Management

Favourable mentions of demand side oriented economic policies (assistance to consumers rather than businesses). Particularly includes increase private demand through

- Increasing public demand;
- Increasing social expenditures.

May also include:

- Stabilisation in the face of depression;
- Government stimulus plans in the face of economic crises.

410 Economic Growth: Positive

The paradigm of economic growth. Includes:

- General need to encourage or facilitate greater production;
- Need for the government to take measures to aid economic growth.

411 Technology and Infrastructure: Positive

Importance of modernisation of industry and updated methods of transport and communication. May include:

- Importance of science and technological developments in industry;
- Need for training and research within the economy (This does not imply education in general, see category 506);

- Calls for public spending on infrastructure such as roads and bridges;
- Support for public spending on technological infrastructure (e.g.: broadband internet).

412 Controlled Economy

Support for direct government control of economy. May include, for instance:

- Control over prices;
- Introduction of minimum wages.

413 Nationalisation

Favourable mentions of government ownership of industries, either partial or complete; calls for keeping nationalised industries in state hand or nationalising currently private industries.. May also include favourable mentions of government ownership of land.

414 Economic Orthodoxy

Need for economically healthy government policy making. May include calls for:

- Reduction of budget deficits;
- Retrenchment in crisis;
- Thrift and savings in the face of economic hardship;
- Support for traditional economic institutions such as stock market and banking system;
- Support for strong currency.

415 Marxist Analysis: Positive

Positive references to Marxist-Leninist ideology and specific use of Marxist-Leninist terminology by the manifesto party (typically but not necessary by communist parties).

Note: If unsure about what constitutes Marxist-Leninist ideology in general or terminology in a particular language, please research.

[416 Anti-Growth Economy and Sustainability, comprised of:]

416.1 Anti-Growth Economy: Positive

Favourable mentions of anti-growth politics. Rejection of the idea that growth is good.

416.2 Sustainability: Positive

Call for sustainable economic development. Opposition to growth that causes environmental or societal harm.

DOMAIN 5: Welfare and Quality of Life

501 Environmental Protection

General policies in favour of protecting the environment, fighting climate change, and other “green” policies. For instance:

- General preservation of natural resources;
- Preservation of countryside, forests, etc.;
- Protection of national parks;
- Animal rights.

May include a great variance of policies that have the unified *goal* of environmental protection.

502 Culture: Positive

Need for state funding of cultural and leisure facilities including arts and sport. May include:

- The need to fund museums, art galleries, libraries etc.;
- The need to encourage cultural mass media and worthwhile leisure activities, such as public sport clubs.

503 Equality: Positive

Concept of social justice and the need for fair treatment of all people. This may include:

- Special protection for underprivileged social groups;
- Removal of class barriers;
- Need for fair distribution of resources;
- The end of discrimination (e.g. racial or sexual discrimination).

504 Welfare State Expansion

Favourable mentions of need to introduce, maintain or expand any public social service or social security scheme. This includes, *for example*, government funding of:

- Health care;
- Child care;
- Elder care and pensions;
- Social housing.

Note: This category excludes education.

505 Welfare State Limitation

Limiting state expenditures on social services or social security. Favourable mentions of the social subsidiary principle (i.e. private care before state care);

506 Education Expansion

Need to expand and/or improve educational provision at all levels.

Note: This excludes technical training, which is coded under 411.

507 Education Limitation

Limiting state expenditure on education. May include:

- The introduction or expansion of study fees at all educational levels;
- Increasing the number of private schools.

DOMAIN 6: Fabric of Society

[601 National Way of Life: Positive, comprised of:]

601.1 General

Favourable mentions of the manifesto country's nation, history, and general appeals. May include:

- Support for established national ideas;
- General appeals to pride of citizenship;
- Appeals to patriotism;
- Appeals to nationalism;

- Suspension of some freedoms in order to protect the state against subversion.

601.2 Immigration: Negative

Statement advocating the restriction of the process of immigration, i.e. accepting new immigrants. Might include statements regarding,

- Immigration being a threat to national character of the manifesto country,
- 'the boat is full' argument;
- The introduction of migration quotas, including restricting immigration from specific countries or regions etc.

Only concerned with the possibility of new immigrants. For negative statements regarding immigrants already in the manifesto country, please see 608.1.

[602 National Way of Life: Negative, comprised of:]

602.1 General

Unfavourable mentions of the manifesto country's nation and history. May include:

- Opposition to patriotism;
- Opposition to nationalism;
- Opposition to the existing national state, national pride, and national ideas.

602.2 Immigration: Positive

Statements favouring new immigrants; against restrictions and quotas; rejection of the 'boat is full' argument. Includes allowing new immigrants for the benefit of the manifesto country's economy.

Only concerned with the possibility of new immigrants. For positive statements regarding immigrants already in the manifesto country, please see 607.1.

603 Traditional Morality: Positive

Favourable mentions of traditional and/or religious moral values. May include:

- Prohibition, censorship and suppression of immorality and unseemly behaviour;
- Maintenance and stability of the traditional family as a value;
- Support for the role of religious institutions in state and society.

604 Traditional Morality: Negative

Opposition to traditional and/or religious moral values. May include:

- Support for divorce, abortion etc.;
- General support for modern family composition;
- Calls for the separation of church and state.

[605 Law and Order, comprised of:]

605.1 Law and Order General: Positive

Favourable mentions of strict law enforcement, and tougher actions against domestic crime. Only refers to the enforcement of the status quo of the manifesto country's law code. May include:

- Increasing support and resources for the police;
- Tougher attitudes in courts;

- Importance of internal security.

605.2 Law and Order General: Negative

Favourable mentions of less law enforcement or rejection of plans for stronger law enforcement. Only refers to the enforcement of the status quo of the manifesto country's law code. May include:

- Less resources for police;
- Reducing penalties;
- Calls for abolishing the death penalty;
- Decriminalisation of drugs, prostitution etc.

[606 Civic Mindedness: Positive, comprised of:]

606.1 General

General appeals for national solidarity and the need for society to see itself as united. Calls for solidarity with and help for fellow people, familiar and unfamiliar. May include:

- Favourable mention of the civil society and volunteering;
- Decrying anti-social attitudes in times of crisis;
- Appeal for public spiritedness;
- Support for the public interest.

606.2 Bottom-Up Activism

Appeals to grassroots movements of social change; banding all sections of society together to overcome common adversity and hardship; appeals to the people as a united actor.

[607 Multiculturalism: Positive, comprised of:]

607.1 General

Favourable mentions of cultural diversity and cultural plurality within domestic societies. May include the preservation of autonomy of religious, linguistic heritages within the country including special educational provisions.

607.2 Immigrants: Diversity

Statements favouring the idea that immigrants keep their cultural traits; voluntary integration; state providing opportunities to integrate.

Only concerned with immigrants already in the manifesto country. For positive statements regarding the possibility of new immigrants, please see 602.2

607.3 Indigenous rights: Positive

Calls for the protection of indigenous people, strengthening their rights, may include:

- Protection of their lands;
- Introduction of special provisions in the democratic or bureaucratic process;
- Compensation for past grief.

[608 Multiculturalism: Negative, comprised of:]

608.1 General

The enforcement or encouragement of cultural integration. Appeals for cultural homogeneity in society.

608.2 Immigrants: Assimilation

Calls for immigrants that are in the country to adopt the manifesto country's culture and fully assimilate. Reinforce integration.

Only concerned with immigrants already in the manifesto country. For negative statements regarding the possibility of new immigrants, please see 601.2

608.3 Indigenous rights: Negative

Rejection of idea of special protection for indigenous people.

DOMAIN 7: Social Groups

Note: Specific policy positions overrule this domain (except 703)! If there is no specific policy position, however, these categories apply.

701 Labour Groups: Positive

Favourable references to all labour groups, the working class, and unemployed workers in general. Support for trade unions and calls for the good treatment of all employees, including:

- More jobs;
- Fair wages;
- Good working conditions;
- Pension provisions etc.

702 Labour Groups: Negative

Negative references to labour groups and trade unions. May focus specifically on the danger of unions 'abusing power'.

[703 Agriculture and Farmers, comprised of:]

703.1 Agriculture and Farmers: Positive

Specific policies in favour of agriculture and farmers. Includes all types of agriculture and farming practises. Only statements that have agriculture as the key goal should be included in this category.

703.2 Agriculture and Farmers: Negative

Rejection of policies favouring agriculture and farmers. May include:

- Cap or abolish subsidies;
- Reject special welfare provisions for farmers.

704 Middle Class and Professional Groups

General favourable references to the middle class. Specifically, statements may include references to:

- Professional groups, (e.g.: doctors or lawyers);
- White collar groups, (e.g.: bankers or office employees),
- Service sector groups (e.g.: IT industry employees);

- Old and/or new middle class.

Note: This is not an economical category but refers to the social group(s).

705 Underprivileged Minority Groups

Very general favourable references to underprivileged minorities who are defined neither in economic nor in demographic terms (e.g. the handicapped, homosexuals, immigrants, indigenous). Only includes favourable statements that cannot be classified in other categories (e.g. 503, 504, 604, 607 etc.)

706 Non-economic Demographic Groups

General favourable mentions of demographically defined special interest groups of all kinds. They may include:

- Women;
- University students;
- Old, young, or middle aged people.

Might include references to assistance to these groups, but only if these do not fall under other categories (e.g. 503 or 504).

000 No meaningful category applies

Statements not covered by other categories; sentences devoid of any meaning.

Procedure for Training and Entry Test

Please copy the test into an empty word document or use the template provided from the supervisor. Then follow these steps to unitise and code the test.

1. Insert the given separator to identify the quasi-sentences. You can do so easily by copying the two signs (// |) in the document's preface. We need the separator to consist of two signs for processing reasons.
2. After you finished cutting the paragraph/document into quasi-sentences, convert it to the coding table by:
 - i. Mark the text.
 - ii. Menu>Table>Convert>Convert Text to Table
 - iii. Fill out the table conversion dialog:
 1. Separate Text at>Other: | (be aware that sometimes the program unselects "Other" as a separator)
 2. Table Size>Number of Columns: 1
 - iv. Now every quasi-sentence should be in a separate table row. Keep empty rows.
 - v. Add another column to the created table (Menu>Table>Insert>Columns to the Right).
 - vi. Adapt the size of new column to about 1,5cm.
3. Type in the codes.
4. Save the document and send it to the supervisor.

Training Test

Coder Name:

Date of Coding:

Country: Australia

Name of the Party/Alliance: National Country Party

Year: 1966

Title: We will grow, prosper (extracts)

Please use this separator **///** to mark quasi-sentences.

'WE WILL GROW, PROSPER'

The Deputy Prime Minister (Mr McEwen) said last night all the Government's policies were aimed at building an Australia respected and trusted throughout the world. Mr McEwen, delivering the Country party policy speech at Sheparton, said: The country party, the Government, has one constant and continuing policy objective - to make Australia strong, safe, prosperous; to build a modern Australia, with equal opportunity for all: where the aged, and the infirm, are looked after; where the young are well educated, properly trained, to play their part in making the greater Australia of the future; where every man, woman and child - native-born Australians and migrants alike - can live in freedom, enjoying the rewards of their own efforts, obtaining their just share of the wealth of the community.

Under our coalition Government's policies, Australia's advance has been remarkable. Here are the results of the 17 years of our responsibility in Government: 3.5 million more people since we came to office - half of them migrants; 1.25 million new jobs (1.6 million new homes built); tremendous increases in wool production; wheat, meat, sugar, dairy products, fruit and so on - with fewer workers. The volume of exports more than doubled. More than 20,000 new factories; factory production increased two and a half times. Mineral production more than doubled. 2,5 million more vehicles on the road - a car for every four people; unprecedented developments in community services; roads, dams, power houses, hospitals, schools. Industries everywhere are creating new wealth, ultimately distributed for all the people in better wages, social services and health, in education and defence.

In 17 years the total production of Australia, including all primary and secondary industries and the service industries which go with them, has doubled. If in 1949, in a policy speech I had said: 'Put the Country party and the Liberal party in power and our policies will double the size of the Australian economy in 17 years', this would have been treated with derision. But we have done it!

This is a story of growth; of increasing national strength; greater safety; higher prosperity; sharing the prosperity. Three years ago, we said our policies would produce 25 per cent growth over five years. Despite the disastrous drought, this objective is well in sight. I now say the next five years will see this rate continued. We are determined that successive generations of Australians will enjoy an even greater measure than we do, an Australian way of life of which we can be proud, and the rest of the world envy.

ALLIANCES

In today's world, no country can stand alone. Safety and security demand that our own growing strength be allied with that of others who share our beliefs in the right of free people to remain free. This is the basis of our foreign policy. We must be sure that if our freedom is threatened we will not be left to stand alone. So we are concerned with the integrity of other small, free countries.

The respect for Australia as a staunch and reliable ally has never been higher. Our great association with Britain and the Commonwealth have been strengthened. We have stood with Britain in preserving the security of Malaysia. Under the AZEUS Treaty we, with New England, have established a great alliance with the United States. Under SEATO we are linked with Britain, the United States and France, and with Asian countries from Pakistan to the Philippines.

PRUDENCE

We help the less-developed countries with aid, and we were the first in the world to give tariff preference to them. We strive constantly for peace, through the United Nations, and will do so unceasingly. But prudence and security demand that we work also for strong and lasting alliances. The most powerful country in the world - the United States - will be with us to protect our freedom if we are threatened with aggression, just as the United States today is protecting the freedom of the people of South Vietnam from communist aggression.

The United States seeks no material gain, fighting this distant war. Australia seeks only to prove that aggression will not succeed. And as Australia herself would expect help if in need, we now demonstrate that we are willing to extend our help to a small, free people under attack. We want to so conduct ourselves that the United States will not hesitate to stand between Australia and an aggressor. America is the one country that can do this. Our troops in South Vietnam earn for us the right to the protection of the United States and our other treaty allies, should Australia be threatened.

Voluntary recruiting has not produced the numbers of men required for the Army. The Government did try, long and hard, to enlist sufficient men as volunteers. Despite all its efforts not enough men came forward to enable us to play our present part with the British in Malaysia and the Americans in South Vietnam. So we have added to the ranks

of our volunteer regular army the necessary numbers of national servicemen to meet the nation's requirements.

To say that we would honor our obligations with the United States and our other allies only if enough volunteers came forward would show Australia as a very uncertain ally. American conscripts have helped to save us once. No Australian would suggest that we were not grateful that they defended us in our day of peril. Surely no responsible Australian would suggest that, in the absence of sufficient volunteers, we should wait until war reaches Australia itself before we called conscripts to the protection of our homeland. We in the Government are sure that we have acted properly in bringing in National Service so that we may join with America in her stand to prevent the outward expansion of aggressive communism.

Of course, safety is not secured only by modern defence forces and alliances. There must be great economic strength - an industrial base capable of servicing and maintaining today's complex military operations; food and mineral production for our own needs, and to earn foreign exchange; good roads and railways; efficient ports. Defence security and economic strength go hand in hand. Our policies promote economic strength. Look at the primary industries.

By 1964, before the calamitous drought total farm output was 67 per cent higher than when we came to office. Wool, still the great foreign country earner, has nearly doubled in production since the war. Wool has been helped by the Japanese Trade Treaty; taxation incentives; huge expenditure on research and technology; and Government-supported promotion activity.

CROP RECORD

Wheatgrowers are about to harvest what could be an all-time record crop; double the average crop of the early 'fifties'. The guaranteed price covers more than 200 million bushels each harvest. This has given the industry the confidence necessary for expansion.

Total bounty payments provided by our Government to the dairy industry, to offset high costs and difficult markets, have amounted to just on 3500 million. A quarter of a million people depend on the dairy industry.

The great sugar industry has a fair price in the home market; a good price for sales under the agreement with Britain; negotiated access for profitable sales to America. The Japanese Trade Treaty has made Japan our biggest sugar customer.

In my policy speech, three years ago, I said: 'If problems arise, we will be ready to help.' We have helped. The sugar industry, through no fault of its own, is in serious temporary

difficulty. It asked for, and our Government has given a loan of \$19 million to augment pool payments from this year's crop. For Australian beef producers, negotiated access to the United States market, and now to Japan, has been worth millions. We have legislated to give effect to marketing or stabilisation plans for canned and dried fruits, for eggs, and also for tobacco, which has been lifted from a peasant industry to one of high average incomes. Cotton is taking dramatic strides forward under the stimulus of our policies.

There are problems - in the apple and pear industry; in dairying; the British move towards the European Common Market; the never-ending job of gaining access to markets. Much has been achieved in meeting these problems. We will never let up in our efforts.

EXPANSION

Our policies for secondary industry are policies for growth, sound expansion, jobs, jobs for a growing, well-paid work force, more than 100,000 new jobs a year. Tariff machinery is continually improved to give prompt and adequate tariff protection; to prevent damage by dumping and disruptive imports. We give efficient secondary industry a secure grip on the home market. From this base we encourage it to develop exports with the help of a variety of export incentives. Investment in manufacturing has risen from \$120 million a year to \$1000 million a year. Great new industries are providing well-paid employment for more and more Australians. Average earnings in real `spending-power terms`, are up 50 per cent. Help is provided for the aged, the infirm, the sick; health and social-service payments lifted from \$162 million to \$1020 million a year. Australia can and must look after the needs of the aged and the infirm. They must be given a full share of benefit from the nation's growth.

FREIGHTS

We have initiated moves to stem overseas freight rises by rationalisation of overseas shipping services; for containerisation and other modern cargo-handling methods, and by establishment of modern port facilities. Industry stabilisation plans form part of the compensation to export industries for the burden of costs arising from fast national growth. So does the \$28 million-a-year subsidy on superphosphate, and our new subsidy on nitrogenous fertilisers of \$30 per ton nitrogen content.

Petrol prices have been reduced to no higher than fourpence a gallon over city prices. Many inland people have been saved more than a shilling a gallon. For years the Country party policy urged this plan.

Special taxation allowance have been granted to primary producers; huge sums provided for agricultural research and extension; massive help for wool promotion. Suitable long-term credit at lower interest rates has been made available for rural and

other development needs. The Commonwealth Development Bank, the trading banks, term loan fund of \$246 million, adds a new dimension to the array of credit facilities available to farmers.

Decentralisation requires practical policies which make country area profitable locations for industry and attractive places for people to live. Housing must be available, so must phones and TV, air services - including freight. For Commonwealth Aid Roads grants we are providing \$750 million in the current five-year period; \$150 million this year, rising to \$170 million the year after next and \$126 million is being found for nearly 2000 miles of rail standardisation and reconstruction.

Our Government acted through State Government to help those affected by the drought. So far \$57 million has been provided. Ways must be found to mitigate the effects of drought; to reduce and alleviate the personal heartbreak and national losses which go with them.

BEEF ROADS

We have given special attention to developing the North and 4000 miles of beef roads have been approved. More are under study and \$57 million is being provided for beef roads in Queensland, Western Australia and the Northern Territory. We have found millions of dollars for port facilities in Western Australia and Queensland: at Weipa in Queensland, and help at Gladstone; in Western Australia more than \$6 million for port improvements at Derby, Wyndham and Broome. We have found \$12 million for stage one of the Ord irrigation project. In Queensland vast areas - 11 million acres - are being turned into high-productive pastures. We are finding \$23 million for this and \$1 million is being provided this year for research into tropical pastures. Freight on superphosphate to Darwin will be subsidised and tax concessions allowed for mining with \$42 million for oil search subsidies.

INDUSTRIES

Nothing contributes more to northern development than the sound and profitable expansion of the industries already located in the north. What has been done for sugar, tobacco, beef and for mineral development is conscious major policy for northern development. These are part of the whole pattern of policies for the development of the north and the balanced development of the whole of Australia.

I said at the beginning that we had a constant objective; to make Australia strong and safe; prosperous at home; respected and trusted throughout the world. I have spoken of some of the things we have done; of what we are doing. These are not disjointed actions, independent of one another; thought up to get some votes, or some credit, or to appease some group. They are all parts of a total; policies all designed for the one overriding purpose; to make Australia strong, safe, prosperous.

We can be proud of what has been achieved; of Australia's great and growing economic strength; of high and rising living standards; of the continuous improvements in education, housing, social services. Because we have honoured our obligations and are playing our part in resisting aggression today we can be confident of our own future safety and security, of the strength of our alliances, of the assured protection of the United States should we ever be threatened. The Australia of today is a base on which an even stronger, safer, more prosperous Australia will be built over the next decade.³

³ Note: The particular countries with which Australia has a special relationship are defined as the Commonwealth countries. ANZUS is a regional security treaty.

Entry Test

Coder Name:

Date of Coding:

Country: USA

Name of the Party/Alliance: The Democratic Party

Year: 2008

Title: Democratic National Platform (extracts)

Please use this separator **///** to mark quasi-sentences.

Preamble

We come together at a defining moment in the history of our nation – the nation that led the 20th century, built a thriving middle class, defeated fascism and communism, and provided bountiful opportunity to many. We Democrats have a special commitment to this promise of America. We believe that every American, whatever their background or station in life, should have the chance to get a good education, to work at a good job with good wages, to raise and provide for a family, to live in safe surroundings, and to retire with dignity and security. We believe that each succeeding generation should have the opportunity, through hard work, service and sacrifice, to enjoy a brighter future than the last.

Over the past eight years, our nation’s leaders have failed us. Sometimes they invited calamity, rushing us into an ill-considered war in Iraq. But other times, when calamity arrived in the form of hurricanes or financial storms, they sat back, doing too little too late, and too poorly. The list of failures of this Administration is historic.

So, we come together not only to replace this President and his party –and not only to offer policies that will undo the damage they have wrought. Today, we pledge a return to core moral principles like stewardship, service to others, personal responsibility, shared sacrifice and a fair shot for all –values that emanate from the integrity and optimism of our Founders and generations of Americans since. Today, we Democrats offer leaders – from the White House to the State House – worthy of this country’s trust.

I. Renewing the American Dream

Jumpstart the Economy and Provide Middle Class Americans Immediate Relief

We will provide an immediate energy rebate to American families struggling with the record price of gasoline and the skyrocketing cost of other necessities – to spend on those basic needs and energy efficient measures. We will devote \$50 billion to jumpstarting the economy, helping economic growth, and preventing another one million jobs from being lost.

We support investments in infrastructure to replenish the highway trust fund, invest in road and bridge maintenance and fund new, fasttracked projects to repair schools. We believe that it is essential to take immediate steps to stem the loss of manufacturing jobs. Taking these immediate measures will provide good jobs and will help the economy today. But generating truly shared prosperity is only possible if we also address our most significant long-run challenges like the rising cost of health care, energy, and education.

Good Jobs with Good Pay

Democrats are committed to an economic policy that produces good jobs with good pay and benefits. That is why we support the right to organize. We know that when unions are allowed to do their job of making sure that workers get their fair share, they pull people out of poverty and create a stronger middle class. We will strengthen the ability of workers to organize unions and fight to pass the Employee Free Choice Act. We will fight to ban the permanent replacement of striking workers, so that workers can stand up for themselves without worrying about losing their livelihoods.

In America, if someone is willing to work, he or she should be able to make ends meet and have the opportunity to prosper. To that end, we will raise the minimum wage and index it to inflation. We will modernize the unemployment insurance program to close gaps and extend benefits to the workers who now fall outside it.

Opportunity for Women

When women still earn 76 cents for every dollar that a man earns, it doesn't just hurt women; it hurts families and children. We will pass the "Lilly Ledbetter" Act, which will make it easier to combat pay discrimination. We will invest in women-owned small businesses and remove the capital gains tax on startup small businesses. We recognize that women are the majority of adults who make the minimum wage, and are particularly hard-hit by recession and poverty; we will protect Social Security, increase the minimum wage, and expand programs to combat poverty and improve education so that parents and children can lift themselves out of poverty. We will work to combat violence against women.

A World Class Education for Every Child

The Democratic Party firmly believes that graduation from a quality public school and the opportunity to succeed in college must be the birthright of every child—not the privilege of the few. We must prepare all our students with the 21st century skills they need to succeed by progressing to a new era of mutual responsibility in education. We must set high standards for our children, but we must also hold ourselves accountable—our schools, our teachers, our parents, business leaders, our community and our elected leaders. And we must come together, form partnerships, and commit to providing the resources and reforms necessary to help every child reach their full potential.

Creating New Jobs by Rebuilding American Infrastructure

A century ago, Teddy Roosevelt called together leaders from business and government to develop a plan for the next century's infrastructure. It falls to us to do the same. We will start a National Infrastructure Reinvestment Bank that can leverage private investment in infrastructure improvements, and create nearly two million new good jobs. We will undertake projects that maximize our safety and security and ability to compete, which we will fund as we bring the war in Iraq to a responsible close. We will modernize our power grid, which will help conservation and spur the development and distribution of clean energy. We need a national transportation policy, including high-speed rail and light rail. We can invest in our bridges, roads, and public transportation so that people have choices in how they get to work. We will ensure every American has access to high-speed broadband and we will take on special interests in order to unleash the power of the wireless spectrum.

Support Small Business and Entrepreneurship

Encouraging new industry and creating jobs means giving more support to American entrepreneurs. We will exempt all start-up companies from capital gains taxes and provide them a tax credit for health insurance. We will help small businesses facing high energy costs. We will work to remove bureaucratic barriers for small and start-up businesses—for example, by making the patent process more efficient and reliable.

Real Leadership for Rural America

Rural America is home to 60 million Americans. The agricultural sector is critical to the rural economy and to all Americans. We depend on those in agriculture to produce the food, feed, fiber, and fuel that support our society. Thankfully, American farmers possess an unrivaled capacity to produce an abundance of these high-quality products.

All Americans, urban and rural, hold a shared interest in preserving and increasing the economic vitality of family farms. We will continue to develop and advance policies that promote sustainable and local agriculture, including funding for soil and water conservation programs.

Restoring Fairness to Our Tax Code

We must reform our tax code. We'll eliminate federal income taxes for millions of retirees, because all seniors deserve to live out their lives with dignity and respect. We will not increase taxes on any family earning under \$250,000 and we will offer additional tax cuts for middle class families. We will dramatically simplify tax filings so that millions of Americans can do their taxes in less than five minutes.

II. Renewing American Leadership

At moments of great peril in the last century, American leaders such as Franklin Roosevelt, Harry Truman, and John F. Kennedy managed both to protect the American people and to expand opportunity for the next generation. They used our strengths to

show people everywhere America at its best. Today, we are again called to provide visionary leadership. This century's threats are at least as dangerous as, and in some ways more complex than, those we have confronted in the past.

We will confront these threats head on while working with our allies and restoring our standing in the world. We will pursue a tough, smart, and principled national security strategy. It is a strategy that recognizes that we have interests not just in Baghdad, but in Kandahar and Karachi, in Beijing, Berlin, Brasilia and Bamako. It is a strategy that contends with the many disparate forces shaping this century, including: the fundamentalist challenge to freedom; the emergence of new powers like China, India, Russia, and a united Europe; and the spread of lethal weapons.

Barack Obama will focus this strategy on seven goals: (i) ending the war in Iraq responsibly; (ii) defeating Al Qaeda and combating violent extremism; (iii) securing nuclear weapons and materials from terrorists; (iv) revitalizing and supporting our military; (v) renewing our partnerships to promote our common security; (vi) advancing democracy and development; and (vii) protecting our planet by achieving energy security and combating climate change.

Recommit to an Alliance of the Americas

We recognize that the security and prosperity of the United States is fundamentally tied to the future of the Americas. We believe that in the 21st century, the U.S. must treat Latin America and the Caribbean as full partners, just as our neighbors to the south should reject the bombast of authoritarian bullies. Our relationship with Canada, our long-time ally, should be strengthened and enhanced.

Advancing Democracy, Development, and Respect for Human Rights

No country in the world has benefited more from the worldwide expansion of democracy than the United States. Democracies are our best trading partners, our most valuable allies, and the nations with which we share our deepest values. The Democratic Party reaffirms its longstanding commitment to support democratic institutions and practices worldwide. A more democratic world is a more peaceful and prosperous place. Yet democracy cannot be imposed by force from the outside; it must be nurtured with moderates on the inside by building democratic institutions.

III. Renewing the American Community

Service

The future of our country will be determined not only by our government and our policies but through the efforts of the American people. That is why we will ask all Americans to be actively involved in meeting the challenges of the new century. We will double the size of the Peace Corps, enable more to serve in the military, integrate service into primary education, and create new opportunities for experienced and retired persons to serve. And if you invest in America, America will invest in you by increasing support for service-learning. We will use the Internet to better match

volunteers to service opportunities. In these ways, we will unleash the power of service to meet America's challenges in a uniquely American way.

Federal Lands

We will create a new vision for conservation that works with local communities to conserve our existing publicly-owned lands while dramatically expanding investments in conserving and restoring forests, grasslands, and wetlands across America for generations to come. Unlike the current Administration, we will reinvest in our nation's forests by providing federal agencies with resources to reduce the threat of wildland fires and promote sustainable forest product industries for rural economic development. We will recognize that our parks are national treasures, and will ensure that they are protected as part of the overall natural system so they are here for generations to come. We are committed to conserving the lands used by hunters and anglers, and we will open millions of new acres of land to public hunting and fishing.

IV. Renewing American Democracy

Open, Accountable, and Ethical Government

In Barack Obama's Administration, we will open up the doors of democracy. We will use technology to make government more transparent, accountable, and inclusive. Rather than obstruct people's use of the Freedom of Information Act, we will require that agencies conduct significant business in public and release all relevant information unless an agency reasonably foresees harm to a protected interest.

We will lift the veil of secret deals in Washington by publishing searchable, online information about federal grants, contracts, earmarks, loans, and lobbyist contacts with government officials. We will put all non-emergency bills that Congress has passed online for five days, to allow the American public to review and comment on them before they are signed into law. We will require Cabinet officials to have periodic national online town hall meetings to discuss issues before their agencies.

Note: The USA has special relationships with the UK and Canada.