

Evolution of the Manifesto Coding Instructions and the Category Scheme

I. CODING INSTRUCTIONS

red text = new
crossed-out = deleted

	Version 1 → Version 2	Version 2 → Version 3	Version 3 → Version 4	Version 4 → Version 5
Specific coding rules	<p>Usage of subcategories for parties in transitional democracies and special subcategories for Cyprus and Mexico</p>	<p>Specification of code allocation if sentences contain several messages: Precedence of policy goals over politics, polity, and policy means (see Decision Rule No. 6)</p> <hr/> <p>Category for general policies not fitting any specific category: Specific Policy Positions beat 303 Efficiency (see Decision Rule No. 7)</p>	<p>Weakened slightly the usage of the '000' category: application of 000 as rare occasions if statements are totally devoid of any meaning and cannot be coded within the context or if they refer to a policy position that is not included in the category scheme (see 4.1 'Rare Occasions: When to Use the '000' Category')</p> <hr/> <p>Weakened slightly the priority of category 703 'Agriculture and Farmers': the inclusion of the word 'farmer' does not automatically make the category 703 (see 4.3 'Agriculture', before in Version 3: "All quasi-sentences devoted to agriculture are to be coded into category 703, even if a specific policy position such as (402) 'Incentives' or (410) 'Economic Growth' is taken to further the interests of farmers.")</p> <hr/> <p>Omission of the possibility for coders to create subcategories: Creating subcategories (see Decision Rule No. 3 in Version 3)</p> <hr/> <p>Restricted use of subcategories for transitional democracies: the coder needs to contact the supervisor to avoid an unnecessary use (see 4.4 'Sub-Categories')</p> <hr/> <p>Omission of EU-Double code: European Community (108/110) as exceptions to the 'one and only one' rule: the specific national position in Policy Domains 2 to 7 has to be coded as well (see Decision Rule No. 12 in Version 3)</p>	

General coding advices		<p>Emphasis on deviation between publicly known positions of party elites from party program majorities (see Commandment No. 5 'Beware of your expectations')</p>	<p>Consideration of context levels in case of ambiguous quasi-sentences (see 'Ambiguity of Quasi-Sentences - A Hierarchy of Context')</p> <p>-----</p> <p>Specification of the distinction between coders' background knowledge and personal bias (see 'Background Knowledge vs. Personal Bias')</p> <p>-----</p> <p>Specific hints on handling ambiguous language:</p> <ul style="list-style-type: none"> -parties make policy statements by mentioning a negative aspect of an issue in order to highlight its importance (see 'Ambiguity of Language') -it is possible to have positive and negative codes on the same issue right next to each other (see 'Proximity of Contradicting Codes') 	
Unitising - Cutting text into quasi-sentences		<p>Specification of the unitising procedure when coding units are in doubt: The respective sentence must be coded twice (in two logically different rounds) and the two solutions for unitising have to be cross-checked before a final decision is taken (Commandment No.9 in Version 3)</p>	<p>Extraction of the unitising procedure when coding units are in doubt: The respective sentence must be coded twice (in two logically different rounds) and the two solutions for unitizing have to be cross-checked before a final decision is taken-(introduced in Version 3 as Commandment No. 9)</p>	
Other		<p>Semantic and structural changes: Renaming of 'Steps' into 'Decision Rules' and introduction of the term 'Commandment'</p>	<p>Semantic and structural changes: -Coding instructions put into subchapter format (deletion of former terms: 'Decision Rule' and 'Commandment') -'Catch-All Categories' as a new term (instead of 'specific policy beat ...' in Version 1-3)</p> <p>-----</p> <p>Training Procedure: Explanation of the training procedure and uncoded Training and Entry Test as attachments (before coded texts as attachments: 'Coding exercise')</p> <p>-----</p> <p>Special relationships should be predetermined on a case by case basis and by reference to the supervisor (see Commandment No. 8 in Version 3: "The coder has to decide in advance with which other country or countries the manifesto country ... has a 'special foreign relationship' ... Note down definitions for all country-specific categories in a coding protocol.")</p>	<p>Reformulations and additions for extension to Latin American countries and presidential candidates</p>

II. CATEGORIES

	Version 1 → Version 2	Version 2 → Version 3	Version 3 → Version 4	Version 4 → Version 5
Renaming		108/110 European Community/Union 410 Economic Growth (Productivity) 606 Civic Mindedness: Positive (Social Harmony)	503 Equality (Social Justice)	108 European Community/Union or Latin America Integration: Positive 110 European Community/Union or Latin America Integration: Negative
Substantial changes		<p>Specification of categories:</p> <ul style="list-style-type: none"> -104 Military: Positive - extended to references to importance of external security -108 European Community/Union - extended to favourable mentions of expanding the competences of the European Parliament -301 Decentralization - extended to favourable mentions of the territorial subsidiary principle -406 Protectionism: Positive - extended to references in favour of export subsidies -411 Technology and Infrastructure - extended to public spending on infrastructure such as streets and harbours -505 Welfare State Limitation - extended to favourable mentions of the social subsidiary principle -605 Law and Order - extended to references to importance of internal security -606 Civic Mindedness - extended to favourable mention of the civil society 	<p>Specification of categories:</p> <ul style="list-style-type: none"> -106 Peace - extended to ending wars in order to establish peace -107 Internationalism: Positive - extended to support for global governance -201 Freedom and Human Rights - specified beyond freedom of speech also as freedom of press, assembly etc. -202 Democracy - extended to support for direct/representative democracy or parts of democratic regimes (rule of law, division of powers, independence of courts etc.) -203 Constitutionalism: Positive - specified as support for maintaining the status quo of the constitution -301 Decentralization - extended to deference to local expertise -304 Political Corruption - specified as abuse of bureaucratic power (abuse in public life) -305 Political Authority - extended to desirability of a strong/stable government in general -402 Incentives - specified as favourable mentions of supply side oriented economic policies (assistance to businesses rather than consumers) -407 Protectionism: Negative - extended to negative references to support for open markets and call for abolishing all means of market protection -409 Keynesian Demand Management - extended to stabilisation in the face of depression and government stimulus plans in the face of economic crises -411 Technology and Infrastructure - extended to support for public spending on technological infrastructure (e.g.: broadband internet, etc.) -416 Anti-Growth Economy specified as opposition to growth that causes environmental or societal harm 	<p>Specification of categories</p> <ul style="list-style-type: none"> - 108 European Community/Union or Latin America Integration: Positive - extension to favourable mentions of integration within Latin America, e.g CELAC, MERCOSUR, UNASUR - 304 Political Corruption - extended to the need to abolish clientelist structures and practices - 413 Nationalisation - extended to calls for keeping nationalised industries in state hand or nationalising currently private industries <p>-----</p> <p>Splitting up 12 main categories into subcategories¹:</p> <ul style="list-style-type: none"> -103 Anti-Imperialism: Positive - extended to a new aspect <ul style="list-style-type: none"> 103.1 State Centered Anti-Imperialism - same content as the main category in former handbook versions 103.2 Foreign Financial Influence - specified as statements against international financial organizations/states using monetary means to assert strong influence over states -201 Freedom and Human Rights: Positive - content of the main category maintained and split up in: <ul style="list-style-type: none"> 201.1 Freedom 201.2 Human Rights - extended also to supportive refugee policies -202 Democracy - content of the main category split up in and introduction of an anti-position: <ul style="list-style-type: none"> 202.1 General: Positive - same content as the main category in former handbook versions but support for direct/representative democracy extracted in 202.3 and 202.4 202.2 General: Negative - calls for withholding democratic rights from

¹ The new categories are used instead of the respective former main categories. Generally, the new subcategories in Handbook 5 can directly be aggregated into their main categories; exceptions are 202.2, 605.2 and 703.2 being aggregated to 000. Some of the transitional subcategories introduced in Handbook 2 have been incorporated into the new category scheme.

<p>Substantial changes</p>			<p>-501 Environmental Protection: Positive - specified as general policies in favour of protecting the environment, fighting climate change, and other green policies, e.g. animal rights</p> <p>-504 Welfare State Expansion - extended to child care and elder care and pensions</p> <p>-507 Education Limitation - extended to introduction or expansion of study fees at all educational levels and increasing of the number of private schools</p> <p>-604 Traditional Morality: Negative - extended to support for modern family composition and calls for the separation of church and state"</p> <p>-605 Law and Order: Positive - restricted to references to the enforcement of the status quo of the manifesto country's law code</p> <p>-606 Civic Mindedness: Positive - extended to calls for solidarity with and help for fellow people, familiar and unfamiliar</p> <p>- 608 Multiculturalism: Negative - specified as appeals for cultural homogeneity in society</p> <p>- 701 Labour Groups: Positive - specified as more jobs; good working conditions; fair wages; pension provisions for workers</p> <p>- 704 Middle Class and Professional Groups - middle class specified also as doctors (physicians); extended to white collar groups, (e.g.: bankers or office employees) and service sector groups (e.g.: IT industry employees)</p> <p>- 706 Non-economic Demographic Groups - specified also as university students and middle aged people</p>	<p>all/certain groups of people or a non-democratic regime, e.g. monarchy or rule of the military</p> <p>202.3 Representative Democracy: Positive - favorable mentions of the system of representative democracy, in particular in contrast to direct democracy</p> <p>202.4 Direct Democracy: Positive - favorable mentions of the system of representative democracy, in particular in contrast to direct democracy</p> <p>-305 Political Authority: Positive - content of the main category split up, extended to new aspects and integration of former subcategories used for transitional democracies in Version 2:</p> <p>305.1 Political Authority: Party Competence - same content as the main category in former handbook versions but desirability of a strong/stable government extracted in 305.3</p> <p>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</p> <p>305.3 Political Authority: Strong government - same content as the main category in former handbook versions but reference to party's competence extracted in 305.1</p> <p>305.4 Former Elites: Positive - cooperation with pre-democratic former authorities in the transition period, amnesty for former, non-Democratic elites (integration and adaption of the former subcategory 3052 'Communist: Positive' introduced in Version 2)</p> <p>305.5 Former Elites: Negative - against former pre-democratic elite's involvement in democratic government, for truth commissions and other institutions illuminating recent history (integration and adaption of the former subcategory 3053 'Communist: Negative' introduced in Version 2)</p> <p>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</p> <p>-416 Anti-Growth Economy: Positive -</p>
----------------------------	--	--	---	--

Substantial changes				<p>content of the main category maintained and split up in:</p> <p>416.1 Anti-Growth Economy: Positive 416.2 Sustainability: Positive</p> <p>-601 National Way of Life: Positive - extended to a new aspect</p> <p>601.1 General - same content as the main category in former handbook versions</p> <p>601.2 Immigration: Negative - statement advocating the restriction of the process of new immigration, e.g. immigration as a threat to national character, 'the boat is full' argument, migration quotas, restricting immigration from specific countries or regions etc.</p> <p>-602 National Way of Life: Negative - extended to a new aspect</p> <p>602.1 General - same content as the main category in former handbook versions</p> <p>602.2 Immigration: Positive - statements favoring new immigrants; against restrictions and quotas; rejection of the 'boat is full' argument, e.g. new immigrants for the national benefit</p> <p>-605 Law and Order - introduction of an anti-position</p> <p>605.1 Law and Order: Positive - same content as the main category in former handbook versions</p> <p>605.2 Law and Order: Negative - references to less law enforcement or rejection of plans for stronger law enforcement, only the enforcement of the status quo of the law code, e.g. less resources for police, reducing penalties, calls for abolishing the death penalty, decriminalization of drugs, prostitution etc.</p> <p>-606 Civic Mindedness: Positive - extended to a new aspect</p> <p>606.1 General - same content as the main category in former handbook versions</p> <p>606.2 Bottom-Up Activism - appeals to grassroots movements of social change, to banding all sections of society together to overcome common adversity and hardship or to the people as a united actor</p> <p>-607 Multiculturalism: Positive - extended to new aspects</p> <p>607.1 General - same content as the main category in former handbook versions</p> <p>607.2 Immigrants: Diversity -</p>
---------------------	--	--	--	---

Substantial changes				<p>statements favoring the idea that immigrants (already in the country) keep their cultural traits, voluntary integration, state providing opportunities to integrate</p> <p>607.3 Indigenous rights: Positive - protection of indigenous people, strengthening their rights, e.g. protection of their lands, special provisions in the democratic or bureaucratic process, compensation for past grief</p> <p>-608 Multiculturalism: Negative - extended to new aspects</p> <p>608.1 General - same content as the main category in former handbook versions</p> <p>608.2 Immigrants: Assimilation - calls for immigrants (already in the country) to adopt the manifesto country's culture and fully assimilate, reinforce integration</p> <p>608.3 Indigenous rights: Negative - rejection of idea of special protection for indigenous people</p> <p>-703 Agriculture and Farmers - introduction of an anti-position</p> <p>703.1 Agriculture and Farmers: Positive - same content as the main category in former handbook versions</p> <p>703.2 Agriculture and Farmers: Negative - rejection of policies favoring agriculture and farmers, e.g. cap or abolish subsidies, reject special welfare provisions for farmers</p>
Sub-Categories for country-specific issues	<p>Creation of a subcategory for 'Cyprus Issue' (6014) and a subcategory for Mexico 'Checks and Balances' (2033)</p> <hr style="border-top: 1px dashed black;"/> <p>Introduction of subcategories used for transitional democracies:</p> <p>Domain 1: External Relations</p> <ul style="list-style-type: none"> -1011 Russia/USSR/CIS: Positive -1012 Western States: Positive -1013 Eastern European Countries: positive -1014 Baltic States: Positive -1015 Nordic Council: Positive -1016 SFR Yugoslavia: Positive -1021 Russia/USSR/CIS: Negative -1022 Western States: Negative -1023 East European Countries: Negative -1024 Baltic States: Negative -1025 Nordic Council: Negative -1026 SFR Yugoslavia: Negative -1031 Russian Army: Negative -1032 Independence: Positive -1033 Rights of Nations: Positive 			

	<p>Domain 2: Freedom and Democracy</p> <ul style="list-style-type: none"> -2021 Transition to Democracy -2022 Restrictive Citizenship -2023 Lax Citizenship -2031 Presidential Regime: Positive -2032 Republic: Positive -2041 Monarchy: Positive <p>Domain 3: Political System</p> <ul style="list-style-type: none"> -3011 Republican Powers: Positive -3051 Public Situation: Negative -3052 Communist: Positive -3053 Communist: Negative -3054 Rehabilitation and Compensation -3055 Political Coalitions <p>Domain 4: Economy</p> <ul style="list-style-type: none"> -4011 Privatisation: Positive -4012 Control of Economy: Negative -4013 Property-Restitution: Positive -4014 Privatisation Vouchers: Positive -4121 Social Ownership: Positive -4122 Mixed Economy: Positive -4123 Publicly-Owned Industry: Positive -4124 Socialist Property: Positive -4131 Property-Restitution: Negative -4132 Privatisation: Negative <p>Domain 5: Welfare and Quality of Life</p> <ul style="list-style-type: none"> -5021 Private-Public Mix in Culture -5031 Private-Public Mix in Social Justice -5041 Private-Public Mix in Welfare -5061 Private-Public Mix in Education <p>Domain 6: Fabric of Society</p> <ul style="list-style-type: none"> -6011 The Karabakh Issue -6012 Rebuilding the USSR -6013 National Security -6061 General Crisis -6071 Cultural Autonomy: Positive -6072 Multiculturalism pro Roma -6081 Multiculturalism against Roma <p>Domain 7: Social Groups</p> <ul style="list-style-type: none"> -7051 Minorities Inland -7052 Minorities Abroad -7061 War Participants -7062 Refugees 			
<p>Introduction as a general category</p>	<p>Considered for all countries and all elections (before: not used in certain countries, e.g. 416 for Australia, Japan and the United States up to 1980)</p> <ul style="list-style-type: none"> - 405 Corporatism - 415 Marxist Analysis - 416 Anti-Growth 			