HISTORY LAB ANNEX

This annex should be used in combination with the edited version of ACE also found in this drive folder. Please note that this annex takes priority over the version of the annex at the end of the ACE guide. Once this Annex is complete, with use cases added, it should be appended to the edited ACE guide in this drive folder, and overwrite the existing annex in that guide.

Political Parties

Political Parties are context dependent, and we will sometimes deviate from ACE:
For example, the Politburo and "Communist Party" would be **GPE.ORG** during the existence of the Soviet Union. However the Green Party in the US would be **ORG.NGO (**following the conventional tag for political parties according to ACE). This is because during the Soviet Union terms like "Politburo" were used to speak about official Soviet government policy, rather than to refer to the organization as a party.

Government Branches/Agencies

These will be frequent and we will follow ACE:
Thus, "United States Department of State" would be - **ORG.GOV**

International Organizations

United Nations - and any international organization (**so including EU and NATO**) are to be tagged as **ORG.MED – note this is a divergence from the ACE guidelines.**

Note: International and regional organizations whose member states are national governments are coded as **ORG.MED**, whereas international organizations whose members are individuals or entities whose primary affiliation is not as a representative of a national government would be coded as **ORG.NGO**.

ORG.MED Examples	**ORG.NGO Examples**
United Nations	International Committee of the Red Cross
United Nations General Assembly (UNGA)	International Confederation of Free Trade
World Bank	Unions
North Atlantic Treaty Organization (NATO)	International Rescue Committee (ICR)
Association of Southeast Asian Nations (ASEAN)	
United Nations High Commissioner on Refugees (UNHCR)	

When a mention of an international organization contains references to multiple entities (when discussing a subsidiary institution within a larger organization), nest the mention of the overall organization as one entity and tag the subsidiary institution as a separate entity, but only when these mentions are separated by spaces or punctuation in the original document.

<u>Examples</u>

Mention: "UN Security Council"
Tagging: `"[[UN Security Council||1]]"`
Entities: 1   UNITED NATIONS SECURITY COUNCIL   ORG.MED

Mention: "SC"
Tagging: `"[[SC||2]]"`
Entity: 2   UNITED NATIONS SECURITY COUNCIL   ORG.MED

Mention: "UNGA"
Tagging: `"[[UNGA||3]]"`
Entity: 3   UNITED NATIONS GENERAL ASSEMBLY ORG.MED

Mention: "NATO DPC"
Tagging: `"[[NATO DPC||5]]"`
Entity: 4   NORTH ATLANTIC TREATY ORGANIZATION DEFENSE PLANNING COMMITTEE ORG.MED

Nesting Tags:
"US-UN" "UK-UN" = ORG.GOV for entire string (primary reference is US or UK Delegation to the UN)
And then nest "US" **= GPE.ORG** and "UN" **= ORG.INT:**

Mention: "US-UN"
Tagging: [[[[US||1]]-[[UN||2]]||3]]
Entity: 1. United States GPE.Nation
                    2. United Nations ORG.MED
                    3. United States Delegation to the United Nations ORG.GOV

Organization Entities used in Person Contexts
"The British Delegates" -- stick with ACE (**per.group**), in cases of doubt it may be **org.gov.** The consideration here is whether the delegates are primarily referred to as individuals (per.group), or as representatives of the organization where their individual or group choices are inconsequential (org.gov).
"The British Delegation" -- stick with ACE
"The rebels" would be an **org** if they are attached to an organization, otherwise they would be **per.group**

CITIES

For cities choose from **GPE.SPECIAL** or **GPE.NATION** depending on when it stands in for the country or for the national government

E.g.**GPE.Special** for *"Met in Paris"*
But **GPE.NATION** for *"Paris condemned the attacks"*

If local government (which should be rare) then tag as **ORG.GOV** to avoid confusing local with national government – e.g. "Paris has increased parking fines for its residents". In this case the Parisian Government is a government organization within the larger French Government.

GPE.NATION
This tag is used when the country (or city) name is used to connote official policy
e.g. "Algeria declared war" would be tagged as **GPE.NATION**

If the country is used geographically, i.e. "The parties met in Algeria" then Algeria would be tagged as **GPE.Special.**

The **GPE.SPECIAL** tag need only be used for nations and cities (when they are employed in the location context) – for other locations – Tennessee for example, or sub-saharan Africa, you should use the **LOC** tag with no subtype.

3.4.1 Subtypes for Locations
Here we deviate from ACE by ignoring subtypes
No subtype tagging, locations would just be tagged as LOC
For example "Southern United States" would be tagged a **LOC,** with a nested reference to "United States" tagged as **GPE.SPECIAL**.

Military Activity
While the guide treats these instances as **GPE.GPE** (e.g. the Soviet Union invades Afghanistan), we will tag them as **GPE.ORG** (since it is a decision made by the government on behalf of the country)

UNIQUE HISTORICAL CASES

In light of contested territorial claims and shifting political and territorial boundaries throughout history, some territorial entities of interest defy easy classification for tagging purposes. These include pre-independence countries that were former imperial colonies (South Africa, Algeria, Rhodesia, etc.); semi-autonomous provinces (Northern Ireland, Hong Kong, Soviet republics of Yugoslavia, etc.); historically significant contested

territorial entities (Taiwan, Cyprus, West Bank, Gaza Strip, etc.); countries whose names (but not their borders) shift in the course of their history (Democratic Republic of the Congo as Zaire between 1971-1997; Cambodia as Kampuchea between 1975 and 1979, etc.) and historically divided countries with periods as separate sovereign nation states (West Germany and East Germany, North Vietnam and South Vietnam, North Korea and South Korea, etc.)

As a general rule of thumb, historically and politically significant territorial entities should be coded as a GPE.Nation or GPE.Special according to its contemporaneous status in the historical time period being referenced. For example, although its independence is contested by China, Taiwan retains sufficient historical significance as an singular entity since its founding to justify any post-1949 mention of the island as either a **GPE.Nation** for "Taiwan" (if referring to the nationalist Republic of China government) or a **GPE.Special** for "Taiwan" (if referring to Taiwan as a territorial space). A similar approach would apply to Hong Kong and Northern Ireland, even though both were subject to formal United Kingdom sovereignty.

The primary goal should be to ascertain the context in which the entity is mentioned. For example is Serbia mentioned in terms of its sovereignty, or in terms of an incipient government? If so the current tag would be **GPE.Nation,** with the primary referent as Serbia - as the reference is to Serbia as a nation. Is Serbia mentioned as a location within Yugoslavia, with no implication that Serbia's sovereignty is relevant? If so the correct type would be **LOC** (not GPE.Special - which is used when a nation-state is used as a location - which, in this particular context, Serbia is not).

With West Germany and East Germany - both constitute potential GPE.Nation mentions, as does Germany alone. The decision will be made based on the context of usage. An explicit mention of the German Government - where the German government being talked about is clearly West Germany - would constitute a GPE.Nation with the primary reference as West Germany. If it is the 1970's, and a mention is made to the territory of Germany generally, as a unified entity, then this can constitute a GPE.Special mention for Germany (despite the existence of no unified German govt).

There should, however, be no GPE.Nation mentions of Germany before the wall comes down, unless that mention is explicitly concerned with incipient German nationhood - in which case a GPE.Nation may apply. The same logic applies to South and North Vietnam (and unified Vietnam).

In the case of countries whose names change, use the official name designated during the time period referenced. For example, mentions of Kampuchea that refer to the government of Cambodia under the Khmer Rouge in 1975-79 would be coded as a **GPE.Nation** for Kampuchea. References to the territory of Cambodia would be coded as a **GPE.Special** for Cambodia or Kampuchea depending on which term appears in the primary source being coded. Any reference to Cambodia post-1979 would be coded as either a **GPE.Nation** or a **GPE.Special** depending on the context for determining sub-type.

A final complicated case comes in the form of the Palestinian territories in the context of the Middle East. In general, mentions of "the Palestinians" or "Palestinian" officials should be coded as a **GPE.Nation** for "Palestine" when these mentions are referring to official representatives of an incipient Palestinian government, particularly when being discussed in the context of formal negotiations or engagement with other government officials. A tag of **GPE.Nation** for "Palestine" would also be appropriate for references to "the PLO" or "the Palestinian Authority" when these entities are being referred to as official representatives of the incipient Palestinian government, but each should be coded as an **ORG.NGO** in all other contexts. A reference to "the West Bank" or "Gaza" should generally be coded as a **GPE.Special** for "Palestine," although **LOC** would also be appropriate if the primary source refers to either specifically as a geographic location that is distinct from its identity as a Palestinian territory.

TIPS FOR NESTING

Only nest a tag if the internal tag is different to the larger tag. "UK Government" – does not need a nested tag for the "UK", since the tag for the nested UK phrase would be **GPE.ORG** and the tag for overall phrase is also **GPE.ORG**. However, "US Department of State" would require a nested tag for the "US" – since that tag would be **GPE.ORG**, while the tag for the whole phrase would be **ORG.GOV**.

# MAPPINGS AND INTERCHANGEABLE TYPES
GPE.ORG = GPE.NATION
GPE.LOC = GPE.Special
ORG.INT = ORG.MED

PRIMARY REFERENCE
Should be the most detailed version of the entity without losing any meaning (United Nations General Assembly rather than General Assembly). Where a wikipedia entry exists for the primary reference, use that entry as the primary reference.

Remember also not to nest an entity if the inner mention has the same type as an outer mention. To use the above example [[United Nations General Assembly]] - there would be no nested tag for the "United Nations" portions - as it would have the same type as the outer mention of "United Nations General Assembly" (both **ORG.MED**). The objective is to tag the most descriptive version of the entity, without losing any information. The United Nations contained within the phrase is not a reference to a separate entity, but instead part of the description of the main entity.

The types you we use come from the following, from common to rare:

GPE.Nation
PER.Individual
GPE.Special
ORG.GOV
LOC
PER.Group
ORG.INT (== ORG.MED)
ORG.NGO
ORG.COM
PER.indefinite
ORG.EDU

USE CASES

NESTING WITH COMMAS

[[TEOFILO DE LA TORRE|| 1]], [[ENGINEER IN CHARGE OF [[COSTA RICAN|| 2]] GEOTHERMAL PROGRAM|| 1]]
1. TEOFILO DE LA TORRE   PER.IND
2. COSTA RICA   GPE.SPECIAL

As opposed to no comma:

[[TEOFILO DE LA TORRE ENGINEER IN CHARGE OF [[COSTA RICAN|| 2]] GEOTHERMAL PROGRAM|| 1]]

GPE.SPECIAL

COUNTRY

...THE PLANNING FOR [[U.S. || 7]] SEMINAR WAS WELL ADVANCED AND INCLUDED PROGRAMS IN [[MEXICO || 8]] AND [[GUATEMALA || 9]] AS WELL AS [[SAN JOSE || 2]]
7. UNITED STATES   GPE.SPECIAL
8. MEXICO   GPE.SPECIAL
9. GUATEMALA   GPE.SPECIAL

[[[[THAI || 52]]-[[LAO || 62]] BORDER
52. THAILAND   GPE.SPECIAL
62. LAOS   GPE.SPECIAL

[[PEOPLE'S REPUBLIC OF MOZAMBIQUE (PRM)|| 1]]
ONE- MAN RULE BY [[[[PRM|| 2]] PRESIDENT SAMORA MACHEL|| 3]]
1. **MOZAMBIQUE   GPE.SPECIAL**
2. MOZAMBIQUE   GPE.NATION

EXAMPLE WITH NESTING: FM [[AMCONSUL [[LOURENCO MARQUES || 1]] ||23]] TO [[SECSTATE || 24]] [[WASHDC ||25]]
INFO [[AMEMBASSY [[BLANTYRE || 27]] || 26]]
[[AMEMBASSY [[DAR ES SALAAM || 29]] || 28]]
23. AMERICAN CONSULATE TO LOURENCO MARQUES   ORG.GOV
24. UNITED STATES SECRETARY OF STATE   ORG.GOV
25. UNITED STATES   GPE.SPECIAL
26. EMBASSY OF THE UNITED STATES, BLANTYRE
27. MALAWI   GPE.SPECIAL

COUNTRY OF ORIGIN
[[MR. & MRS. PARKER [[(ENGLISH) || 1]], || 24]]
1. UNITED KINGDOM   GPE.SPECIAL

[[[[AMERICAN || 2]] CITIZEN GREGORY SCHARF || 3]]
2. UNITED STATES   GPE.SPECIAL

LANGUAGE
He speaks [[French || 1]] and [[Portuguese || 2]]
1. FRANCE   GPE.SPECIAL
2. PORTUGAL   GPE.SPECIAL

GPE.NATION

[[FRENCH || 1]] DESCRIBED RECENT BILATERAL DISCUSSION WITH [[SOVIETS || 2]] ON
MDW
1. FRANCE   GPE.NATION
2. SOVIET UNION   GPE.NATION
(MDW not annotated because it refers to weapons of mass destruction not an entity per se.)

EXAMPLE WITH NESTING: [[[[LOWER SAXONY || 28]] GOVERNMENT ||29]]
28. LOWER SAXONY   LOC
29. LOWER SAXONY GOVERNMENT   GPE.NATION

EXAMPLE WITH NESTING: [[PEOPLE'S REPUBLIC OF MOZAMBIQUE (PRM)|| 1]]
ONE- MAN RULE BY [[[[**PRM**|| 2]] PRESIDENT SAMORA MACHEL|| 3]]
1. MOZAMBIQUE   GPE.SPECIAL
2. **MOZAMBIQUE   GPE.NATION**

AMBIVALENT EXAMPLES:

THE PRIME MINISTER AND HIS GOVERNMENT. SOARES FORMED A WEAK MINORITY
GOVERNMENT.
The minority government is a GPE.Nation because a government was formed.

ETHIOPIAN SOVEREIGNTY
GPE.Nation because it is an explicit reference to sovereign governance.

UKRAINE (SPECIFICALLY KIEV) PRE 1991 == SOVIET UNION OR UKRAINIAN SSR
This depends on the context. In the 1970s any mention of the Ukrainian government is likely
referring to the Soviet govt. in Ukraine - in which case it would be Soviet Union GPE.Nation.
However if they are explicitly referring to Ukraine as a place then you could have Ukraine as a
GPE.Special (if they are clearly referring to Ukraine itself).

GERMANY   *see SECTION UNIQUE HISTORICAL CASES
WEST GERMANY
EAST GERMANY

LOC

WEST BANK   LOC
DEVELOPING COUNTRIES   LOC
PANAMA CANAL ZONE   LOC
LATIN AMERICA   LOC
AFRICA   LOC

THE WEST   LOC
NORDIC   LOC

TEMPELHOF CENTRAL AIRPORT   LOC
[[TEMPELHOF AIRPORT ||3]]

EXAMPLE OF DESIGNATED LOC:
OUR TWO COUNTRIES   LOC
(Reference is to the United States and Soviet Union)
[[OUR TWO COUNTRIES || 13]] AND TO THE SMOOTH OPERATION OF [[OUR || 13]]
CURRENT FIVE-YEAR AGREEMENT CONCERNING TRADE IN WHEAT AND CORN IN
PARTICULAR.

EXAMPLES WITH NESTING:
[[[[LOWER SAXONY || 28]] GOVERNMENT ||29]]
28. LOWER SAXONY   LOC
29. LOWER SAXONY GOVERNMENT   GPE.NATION

[[[[THAI || 52]]-[[LAO || 62]] BORDER || 61]]
52. THAILAND   GPE.SPECIAL
61. THAILAND-LAOS BORDER   LOC
62. LAOS   GPE.SPECIAL

ORG.GOV

MILITARY OF HONDURAS   ORG.GOV
US DELEGATION TO 31ST UNITED NATIONS GENERAL ASSEMBLY   ORG.GOV
US INTERNATIONAL LAW ENFORCEMENT ACADEMY   ORG.GOV

EXAMPLES WITH NESTING:

CONGEN
United States Consulate General   ORG.GOV
[[CONGEN || 1]]
(United States is not mentioned in the abbreviation so does not become a separate mention.)

USUN
]US Mission to the United Nations   ORG.GOV
[[USUN || 2]]

AMCONSUL   ORG.GOV

US Consulate in (city)
[[AMCONSUL || 4]]

SACEUR   ORG.GOV
Supreme Allied Commander, Europe
[[SACEUR ||1]]

CINCEUR   ORG.GOV
United States Commander in Chief, European Command
[[USCINCSO || 61]]

[[WE || 11]] WOULD APPRECIATE COMMENTS FROM [[STATE || 12]], [[COMMERCE || 13]]
AND OTHER POSTS.
11. EMBASSY OF THE UNITED STATES,SAN JOSE   ORG.GOV
12. UNITED STATES DEPARTMENT OF STATE   ORG.GOV
13. US DEPARTMENT OF COMMERCE   ORG.GOV

ORG.MED
UNITED NATIONS   ORG.MED
UNITED NATIONS GENERAL ASSEMBLY (UNGA)   ORG.MED
UNESCO EXECUTIVE BOARD   ORG.MED
UNITED NATIONS HUMAN RIGHTS COMMISSION   ORG.MED
UN HRC AD HOC WORKING GROUP ON CHILE   ORG.MED
UN COMMUNICATIONS COMMITTEE   ORG.MED
INTERNATIONAL SOCIETY FOR KRISHNA CONSCIOUSNESS   ORG.MED

PER.IND

CYRUS VANCE   PER.IND
HENRY KISSINGER   PER.IND
MENACHEM BEGIN   PER.IND

AMBIVALENT EXAMPLES:

THE PRESIDENT   PER.IND
If the reference is to a US president, in, for example, 1976, the mention will be Jimmy Carter:
[[The President || 1]]   => JIMMY CARTER   PER.IND
The same is true with other references, such as SYG, which is the UN Secretary General. So
SYG in a cable from 1976 then would be:
[[SYG || 1]] => KURT WALDHEIM   PER.IND

If the name is easily traceable, use the original reference, e.g. "The president" or "SYG" in the mention

EXAMPLE WITH NESTING:
FRANGIE/CHAMOUN
2. DANY CHAMOUN   PER.IND
3. SULEIMAN FRANGIEH   PER.IND
[[FRANGIE || 3]]/[[CHAMOUN || 2]]

ORG.NGO

EXECUTIVE COMMITTEE OF THE LEAGUE OF COMMUNISTS OF YUGOSLAVIA
ORG.NGO

REPUBLICANS   ORG.NGO
LABOR PARTY   ORG.NGO
THE LIBERALS   ORG.NGO
THE PLO*   ORG.NGO
THE INTERNATIONAL BROTHERHOOD OF IRON WORKERS   ORG.NGO
(it is not an international organization, e.g. ORG.MED, despite the name, if multiple nations are not involved; as opposed to the UN,which is an ORG.MED.)
*see SECTION UNIQUE HISTORICAL CASES

EXAMPLE WITH NESTING:
INDEPENDENT LIBERAL PARTY (ILP) CENTRAL COMMITTEE
1. INDEPENDENT LIBERAL PARTY CENTRAL COMMITTEE   ORG.NGO
[[INDEPENDENT LIBERAL PARTY (ILP) CENTRAL COMMITTEE || 1]]

PER.GROUP

WESTERN FINANCIAL COMMUNITY   PER.GROUP
YUGOSLAV FINANCIAL COMMUNITY   PER.GROUP

WHITE   PER.GROUP
GOAN   PER.GROUP
MULATTO   PER.GROUP
BLACK   PER.GROUP

US MEMBERS OF INTERNATIONAL SOCIETY FOR KRISHNA CONSCIOUSNESS
PER.GROUP

EXAMPLE OF A DESIGNATED GROUP:

[[OTHER NATIONAL LEADERS OF STATURE ||10]] SUCH AS [[TSALDARIS, KONDYLIS AND DEMERTZIS || 10]]
10. TSALDARIS, KONDYLIS AND DEMERTZIS   PER.GROUP

EXAMPLE WITH NESTING:
1   UNITED KINGDOM   GPE.SPECIAL
24   MR. PARKER & MRS. PARKER (ENGLISH)   PER.GROUP
25   MR. & MRS. ROBERT SWAIN   PER.GROUP
26   MR. & MRS. DAVISON (CANADIAN)   PER.GROUP
27   MR. & MRS. JANNAS (CHILEAN)   PER.GROUP
28   MR. & MRS. MIRA (COLUMBIAN)   PER.GROUP
31   MR. & MRS. TRUJILLO AND THEIR THREE CHILDREN (COLOMBIAN)
[[MR. & MRS. ROBERT SWAIN || 25]]
[[THEIR || 25]] DAUGHTER AND GRANDDAUGHTER,
[[MR. & MRS. PARKER [[(ENGLISH) || 1]], || 24]]
[[MR. & MRS. DAVISON [[(CANADIAN) || 11]], ||26]]
[[MR. & MRS. JANNAS [[(CHILEAN) || 33]], || 27]]
[[MR. & MRS. MIRA [[(COLUMBIAN) || 9]], || 28]]
[[MR. & MRS. TRUJILLO AND THEIR THREE CHILDREN [[(COLOMBIAN) || 9]] || 31]]

ORG.COM

Private companies

TROPICAL RADIO TELEGRAPH CO.   ORG.COM
UNITED FRUIT COMPANY   ORG.COM
MITSUI TRADING   ORG.COM

Independent news organizations

PRIVREDNI PREGLED   ORG.COM
POLITIKA   ORG.COM

EXAMPLE WITH NESTING:
SOUTH AFRICAN ARGUS PRESS
50. SOUTH AFRICA   GPE.SPECIAL
51. ARGUS-PRESS   ORG.COM
EXAMPLE WITH NESTING: [[[[SOUTH AFRICAN || 50]] ARGUS PRESS || 51]]
(general references to "the press" are not usually annotated.)

ORG.EDU

HONDURAN COLLEGE OF ECONOMISTS   ORG.EDU
NEW YORK UNIVERSITY   ORG.EDU
AMERICAN UNIVERSITY OF BEIRUT   ORG.EDU

EXAMPLE WITH NESTING:
[[THE AMERICAN UNIVERSITY OF [[BEIRUT || 9]] ||8]]

Cable Abbreviations spreadsheet:
https://docs.google.com/a/columbia.edu/spreadsheets/d/11IB42y6k4WKBH0RfwqANiIhfuB1yCvI8Xxs7Fd18vl8/edit?usp=sharing