**On Conceptualizing Programmatism (February 22, 2016)**

Dear Herbert,

First of all, apoloiges for the delay getting back to you on this, I was traveling last week to promote our programs in varous European cities.

This is indeed my lighter semester, thankfully, and is giving me a bit more time to work on my papers. I do have two papers that I am presenting at Midwest this year (one of which is brand new, co-authored with Emerson and Austin Wang), which will require my focus until mid-April.

That said, I am certainly amxious to get rhythm back on our papers. In that spirit, before responding to the specifics of your message, let me provide a 'meta-comment', namely that I strongly believe we should focus on party-level measures Cohesion and Salience, and leave the larger measure with polarization and national measurement asures for the eventual Volume chapters. If we continue to try and do this all at once, I feel we will continue spinning our wheels. More specifically, my reasoning is as follows:

a.) measuring polarization is very complicated

b.) a three-tiered dependent variable will be very difficult to 'sell' in peer-review

c.) theoretically, the link between organization and COSAL has always been clearer to me than the link with 'differentiation'

d.) I believe our work will be much more efficient if we create these indices **pragmatically, based on what we need for individual papers**, rather than trying to create the entire set of indices exhaustively and then working backwords to see which makes sense for which paper

e.) I believe (a)-(d) despite the fact that I know the GDP correlation dissipates when POL is not included in the index

Now, with this in mind, see the following responses to your points above (embedded in the text below).

Best,

Dan

On 15 February 2016 at 21:35, Herbert Kitschelt <[h3738@duke.edu](mailto:h3738@duke.edu)> wrote:

Dear Dan,

Given the continuing difficulties of Kent and Haohan to figure out what exactly was implemented when the programmatism index was constructed in 2010, I have once again put a fair amount of labor into this challenge,  based on the memo I wrote in March 2015 (attached ) and our exchange later in the year (some of this attached here), later supplemented by a long exchange about the "normalization" of variables (October 2-4, 2015, as appendix in the document I now produced).

My feeling now is that we want to shepherd Haohan through this process with the precise and transparent instructions we want to see implemented in the various CoSal and CoSalPo programmatism indices.

I would therefore ask you to read the last here attached document carefully, and especially attend to the still open or arguable issues before I'll give this to Haohan, talk him through it, and then let him produce the various indices.

Here are points I would ask you to attend to or answer questions:

(1) We want to have everything done in two versions, one with means-corrected party expert policy scores d1, d2…, one with the raw scores. The difference actually matters only, as far as I can tell, for the construction of the cohesion attribute of party programmatism, but not the salience or even the polarization attributes, but I am not 100% certain in the latter case (please enlighten me, whether my hunch is true that both datasets would produce exactly the same polarization scores, regardless of whether raw or means corrected variables are used).

**Indeed, mean-correcting has no affect on Salience or Polarization, as long as Polarization is computed from individual expert scores. However, mean-correcting may effect the polarization score if we are computing it based on averages acorss experts. So, if we first calculate 'Differentiation' at the expert level and then aggregate acorss experts, mean-correcting will have no impact. But if we first aggregate average party positions, and then calculate ´Differentiation', mean-correcting may matter.**

**AGAIN, MY SENSE IS TO DIFFER THIS ISSUE TO LATER AND FOCUS ON CO AND SAL, WHICH ARE MUCH CLEARER!**

(2) One big change from everything done so far, including Freeze/Kitschelt, is that everything will be constructed from the ground-up, I.e. From the individual party level up. That means in the aggregation of of parties' CoSal or CoSalPo scores to the national level, we no longer rely on NATIONALLY most salient, polarizing, etc. issue scores, but on the CoSal(Po) products generated at the individual party level. So the national programmatism score may combine different issues d1, d2, …dn for each party, depending on what that particular party treats as the programmatically most structured issues. There is also, then, no more national polarization variable (the standard deviation of the parties' mean scores on an issue, weighted by the size of parties). Polarization in CoSalPo comes in only through one or another (see below) ways to calculate polarization at the individual party level.

**At the national level, the question is conceptual: for example, does it matter for national-level 'PROGRAMMATISM' whether parties are programmatic on the same issues? For example, is it a bad sign for programmatic structuration if all parties emphaszie entirely different issues?**

**AGAIN, I SUGGEST WE AVOID THIS DEBATE NOW, AND FOCUS PURELY ON PARTY-LEVEL MEASURES OF CO AND SAL!**

(3) ON STEP 2, COHESION: As with Kent Freeze, I propose that we do not score cohesion where the standard deviation would have to be computed from a mere 5 or fewer respondents. These smallest-n generated sd's are way too volatile and accidental. Moreover, such cases would anyway receive very little programmatism (CoSal, CoSalPo), because the "sal" component is so small (5 respondents typically are fewer than 50% of those asked). I am therefore willing to score issues as zero programmatism where more than half of the experts decline scoring … it can only mean that no one has a clue of what parties stand for.

**AGREED**

(4) ON STEP 3, COHESION, see also RULE 2, p. 3, in order to reign in on the possible impact of a few extreme outliers. Actually, I am not sure whether the rule applies to any real empirical case, where the raw estimate of in cohesion could be a standard deviation of 3.5 or even higher!

**AS LONG AS THIS APPLIES TO VERY FEW CASES, I WOULD AVOID THIS TYPE OF CORRECTION: WE WANT TO HAVE AS FEW 'TWEEKS' AS POSSIBLE, AS IT IS THESE TWEEKS WHICH END UP MAKING REPLICATION AND JUSTIFICATION DIFFICULT.**

(5) POLARIZATION, pp. 5-6: Compare what I propose and what you propose to create the party-level differentiation/polarization index. You propose to start from the individual expert scores of issue i for party j, I propose to simply take the mean expert scores of party j's position on i and then create the dyads to the experts' perceived mean positions of the other parties on the issue i. Is my procedure easier? Are they equivalent? Did you propose your procedure because for writing the code this is the way to go?

**SEE MY COMMENTS ABOVE: I SUGGEST WE AVOID THESE ISSUES FOR NOW AND FOCUS ON CO AND SAL**

==> please edit this section and, if necessary eliminate "my" option, but write something that you believe Haohan can unambiguously implement.

I am also still not sure whether the party-level polarization index is constructed correctly. It is the case that parties at the extremes get higher scores, and growing scores as they become more radical and/or grow in relative size (electoral support). This is what we want. But given the relational nature of the polarization metric, centrist parties have slightly different polarization scores contingent upon the extreme parties' positions, even when the focal centrist parties do not move. But even that may be ok: After all, we are using the polarization index not to gauge a party's moderation or extremism per se, but its distinctiveness relative to the programmatic appeal of other parties, and that, indeed is affected by the size and location of these other parties, in interaction with the internal decisions made about party positioning in the focal party.

(6) P. 6, proposal of a new attribute of "ECCENTRICITY" as substitute for polarization: See the CAPITALIZED last entry … I only propose this measure, but then do not pursue it any further in the creation of aggregates.

**SEE MY COMMENTS ABOVE: I SUGGEST WE AVOID THESE ISSUES FOR NOW AND FOCUS ON CO AND SAL**

(7) NORMALIZATION (p. 7): This is against the backdrop of our October 2015 musings. OK? Touchy is the criterion 3, BOUNDED values: We set highest and lowest observed values to 0 and 1, although in the case of lowest values this is bound to coincide with 0.

**HERE THE QUESTION IS WHETHER THE NORMALIZATION SHOULD BE CONFINED TO INDIVIDUAL ISSUES, OR THERE SHOULD 'CROSS-ISSUE' NORMALIZATIONS. I AM IN FAVOR OF GENERATING BOTH VERSIONS, THOUGH IF I HAD TO CHOOSE I WOULD PERFORM ISSUE-SPECIFIC NORMALIZATIONS.**

(8) Does MEANS CORRECTION really matter for anything but cohesions? … See my question above. I don't know whether polarization indices are at all affected by the use of raw or means-corrected data. So the difference between the two datasets is driven ONLY by the construction of the Cohesion component, where use of one rather than the other makes a HUGE difference (and "huge" capitalized, as Donald Trump would…).

**SEE COMMENTS ABOVE**

(9) step 6: individual parties' individual issue programmatism … so we'll always have two specifications (calculated with means-corrected and raw data) and two programmatism expressions (CoSal and CoSalPo). Is there any point of dropping salience and also calculate CoPo, cohesion X polarization, never mind salience?

**SEE COMMENTS ABOVE**

(10) step 7: This is the critical one where we aggregate issues i in each party's overall programmatism score. I propose to keep it to three versions.

I imagine that you may be deluged with teaching and administrative obligations … or is this your semester more or less "off"? I would dearly hope that you can attend to this editing and revising job of my memo quickly so that we can get Haohan to bring this to a closure very soon.

Best,

Herbert