

# LATINUS CODEBOOK 2024

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# 1. CABINET

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- **port\_type**

*HoG*: : Head of government

*ViceHoG* : Vice-presidency (only presidential systems)

*M\_special* : Ministry with a higher hierarchy than regular (include Vice-Prime Ministers)

*M\_wP* : Minister without portfolio

*M* : Regular ministry

*other* : Non ministry position with ministry hierarchy

*underM* : Under ministry

- **port\_type\_COUNTRY: COUNTRY SPECIFICITY**

Type of portfolios specific to the country (In Portugal there are State Ministries, Vice-Ministries and Adjunt Ministers, and regular Ministries)

- **port\_core: CORE PORTFOLIOS**

Before the minister's appointment, was this one of the key ministries within the government, responsible for strategic areas and/or of greater relevance to political actors?

*core*

*no core*

- port\_field: MINISTERIAL POLICY AREA

<b>HoG</b>	Head of Government
<b>ViceHoG</b>	Vice Head of Government
<b>cabinet_chief</b>	Chief of Cabinet
<i>cabinet</i>	any other portfolio in the cabinet area
<b>wP</b>	Minister without Portfolio & Policy Area
<b>finance_M</b>	Minister of Finance
<i>finance</i>	any other portfolio in the finance area
<b>foreign_M</b>	Minister of Foreign Affairs
<i>foreign</i>	any other portfolio in the foreign area
<b>defence_M</b>	Minister of Defence
<i>defence</i>	any other portfolio in the defence area
<b>interior_M</b>	Minister of Interior
<i>interior</i>	any other portfolio in the interior area
<b>justice_M</b>	Minister of Justice
<i>justice</i>	any other portfolio in the justice area
<b>administration</b>	administration area
<b>economy_M</b>	Minister of Economy
<i>industry</i>	industry area
<i>energy</i>	energy area
<i>agriculture</i>	agriculture area
<i>economy</i>	any other portfolio in the economy area
<b>publicW_M</b>	Minister of Public Work
<i>transport</i>	transport
<i>publicW</i>	any other portfolio in the Public Work area
<b>labour_M</b>	Minister of Labour
<i>labour</i>	any other portfolio in the Labour area
<b>education_M</b>	Minister of Education
<i>education</i>	any other portfolio in the education area
<b>health_M</b>	Minister of Health
<i>health</i>	any other portfolio in the health area
<b>welfare_M</b>	Minister of Welfare
<i>groups</i>	any other portfolio in the social groups area
<i>culture</i>	any other portfolio in the culture area
<i>welfare</i>	any other portfolio in the welfare area
<b>other</b>	Other portfolio
<i>underM</i>	Under minister

## 2. EDUCATION

### edu\_LEVEL

- **edu\_level:** HIGHER LEVEL OF EDUCATION

<i>none</i>	<i>military</i>
<i>primary</i>	<i>graduate</i>
<i>secondary</i>	<i>post-graduate (less than PhD)</i>
<i>higher (non university)</i>	<i>PhD</i>

### edu\_FIELD

<i>edu_field categories</i>		(old)
	<i>military</i>	<i>military</i>
	<i>law</i>	<i>law</i>
	<i>economic / business /management</i>	<i>economic / business / management</i>
to include!	<i>management (previously included in economic)</i>	
eliminated	<i>engineering (include agronomy)</i>	<i>engineering</i>
	<i>agronomy</i>	<i>agronomy</i>
	<i>medicine</i>	<i>medicine</i>
	<i>social sciences (not-LAW, not-ECO)</i>	<i>social sciences</i>
	<i>natural sciences (biology /chemistry /physics)</i>	<i>biology /chemistry /physics</i>
	<i>formal sciences (science /mathematics /computer)</i>	<i>science /mathematics /computer</i>
	<i>humanities</i>	<i>humanities</i>
	<i>other</i>	<i>other</i>
to correct!	<i>none</i>	<i>not apply</i>

- **edu\_field1:** FIELD OF GRADUATE EDUCATION [use *edu\_field categories*]  
If your country shows a relevant category not included in our set of categories, include it.

- **edu\_field1\_complete**

Indicate the complete original denomination of the field of education (original language)

\*\* [If more than one GRADUATE, create: **edu\_field1b**; edu\_field1c, etc.]

\*\*\*

- **edu\_field2:** FIELD OF POSTGRADUATE EDUCATION [use *edu\_field categories*]  
If your country shows a relevant category not included in our set of categories, include it.

- **edu\_field2\_complete**

Indicate the complete original denomination of the field of education (original language)

[If more than one POSTGRADUATE education, create: **edu\_field2b**; edu\_field2c, etc.]

### edu\_RELATED

- **edu\_related** [it should be "field\_related"]

Is any of the education fields (*edu\_field1* or *edu\_field2*) related to the portfolio field (*port\_field*)?

*no*

*some*

*yes*

[Consider as general reference the table below. Be critical and propositive]

- **level\_related** [NEW: TO COMPLETE]

If the education field is related (that is, if *edu\_related*==some/yes), what is the level the that related education?

*graduate*

*post-graduate*

*PhD*

Table 2: Guidelines for Linking Portfolio Fields to Education Fields (i.e., to codify EDU\_RELATED)

PORT_FIELD		EDU_RELATED (education field related to portfolio field)			
<b>HoG</b>		law (some)		social sc. [some]	
	ViceHoG	law (some)		social sc. [some]	
<b>cabinet_chief</b>		law (some)		social sc. [some]	
	cabinet	law (some)		social sc. [some]	
<b>wP</b>		law (some)		social sc. [some]	
<b>finance_M</b>			<b>ECONOMIC</b>		
	finance		<b>ECONOMIC</b>		
<b>foreign_M</b>		law (some)		social sc. [some]	
	foreign	law (some)		social sc. [some]	
<b>defence_M</b>					<b>MILITARY</b>
	defence				<b>MILITARY</b>
<b>interior_M</b>		law (some)		social sc. [some]	
	interior	law (some)		social sc. [some]	
<b>justice_M</b>		<b>LAW</b>			
	justice	<b>LAW</b>			
<b>administration</b>		<b>LAW</b>	<b>MANAGEMENT</b>	Social Sc. *	
<b>economy_M</b>			<b>ECONOMIC</b>		
	industry		<b>ECONOMIC</b>	<b>ENGINEERING</b>	
	energy		<b>ECONOMIC</b>	<b>ENGINEERING</b>	
	agriculture NAT-RES		<b>ECONOMIC</b>	<b>ENGINEERING</b>	
	economy		<b>ECONOMIC</b>	<b>ENGINEERING</b>	
<b>publicW_M</b>			<b>ECONOMIC</b>	<b>ENGINEERING</b>	
	transport		<b>ECONOMIC</b>	<b>ENGINEERING</b>	
	publicW		<b>ECONOMIC</b>	<b>ENGINEERING</b>	
<b>labour_M</b>		law *	<b>ECONOMIC</b>		
	labour	law *	<b>ECONOMIC</b>		
<b>education_M</b>		law *		<b>SOCIAL Sc. ^^</b>	<b>FORMAL Sc.</b>
	education	law *	engineering (some)	<b>SOCIAL Sc. ^^</b>	<b>FORMAL Sc.</b>
<b>health_M</b>		law *			<b>MEDICINE</b>
	health	law *			<b>MEDICINE</b>
<b>welfare_M</b>		law *		<b>SOCIAL Sc. ^^</b>	
	groups	law *		<b>SOCIAL Sc. ^^</b>	
	culture			<b>SOCIAL Sc. ^^</b>	<b>HUMANITITES</b>
	welfare	law *		<b>SOCIAL Sc. ^^</b>	
* Evidence of specialization is required.					
^^ specialization is assumed (and there is no evidence of no-specialization)					

RATIONALE (to develop):

Juan, we need to make explicit the rationale that is behind the linking Guide (Portfolio\_field; edu\_field)

The basic rationale behind the relationship portfolio\_field/education field is given by the example of the Economic Portfolio and the Economic Degree: the economic degree implies the development of individual skills related to Economic Portfolio

### **POLITICAL PORTFOLIOS**

- a) **No educational field can't provide "ample" related level.** Political portfolios require multiplicity of skills, there is no specific degree that can guarantee all these skills.
- b) **Certain education background can provide "some" related levela**
  - LAW (traditionally related to politics) provides basic knowledge about the functioning of the state.
  - Certain SOCIAL SCIENCES (such as Political Science or International Relations) may deliver some political skills. It is expectable even background on other social sciences would be providing similar skills (the assumption is that that ministers of political portfolios background on, e.g. sociology or anthropology, have developed similar skills to those on political science). For simplicity, we assume that the category 'social sciences' include some of this has some specialization (that is, "specialization is assumed")

### **PUBLIC ADMINISTRATION & LAW**

- LAW provides basic knowledge about the functioning of the state.

### **SOCIAL PORTFOLIOS**

- The assumption is that SOCIAL SCIENCES provides skills related to social portfolios. Here, specialization is also assumed
- There are some specialization within LAW oriented to social matters. Then, we will consider as portfolio related a LAW background only if there is evidence of this specialization (that is, "evidence of specialization is required").

### 3. JOB EXPERTISE

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- **expertise\_Job: JOB EXPERTISE**

Did the minister have a relevant job experience in the portfolio area before being appointed?

**none:** The minister had NO related professional expertise

*[No related professional/job position]*

**some:** The minister had MODERATE related professional expertise

*[Short-term OR low-ranking related professional/job positions]*

**ample:** The minister had CONSOLIDATED and HIGH-RANK related professional expertise

*[Long-term AND high-ranking related professional/job positions]*

*This variable identifies whether the minister had relevant job experience in the thematic area of the portfolio prior to their appointment. It answers the question: "Did the minister have significant work experience in the specific area of the portfolio before being appointed?" The purpose is to assess the connection between the minister's prior work and the responsibilities of their position.*

#### **GUIDING (related professional) POSITIONS**

*(If you find other positions that fit our definition, let me know)*

*Build your story by referring to the MOST RELEVANT positions of your case.*

#### **TOP Related job positions:**

- **A) Ministers and secretaries of related areas**
- **B) Related professions**

Examples:

- Economist to Economy Portfolio
- Professor de Derecho que va a Justicia

- **C) Related positions**

Examples:

- Presidents of "related" parliamentary committees
- Officers the European Parliament (e.g., President of the EU parliament who became Foreign Affairs minister)
- CEO's of big private organizations (e.g., President of national football league who became minister of sport and youth)
- Presidents of lobby associations (e.g. president of the association representing the defense and security sector who became Defense minister)
- Ambassadors (who became to Minister of Foreign Affairs)

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*Positions like ministers -and many others- are "multi" indicators (the same positions can be use to capture for both professional and managerial expert)*

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- **expertise\_Job\_type: JOB EXPERIENCE PRIOR TO APPOINTMENT**

*Esta variável identifica a ocupação ou o tipo de emprego que o ministro exercia antes de sua nomeação, entendida como a atividade laboral concreta da qual obtinha seu sustento. Responde à pergunta: "Em que trabalhava? De que vivia antes de ser nomeado?". Dado o caráter exploratório desta tarefa, as respostas serão registradas em formato aberto, permitindo que os codificadores decidam a classificação mais adequada.*

Nos interessa detectar:

- a) a ocupação laboral, não educação (e.g., "advogado" indica que trabalhava de advogado,
- b) a ocupação predominante, não todas
- c) a ocupação mais recente (não toda a carreira)

Categorias que temos até agora

## **A. CATEGORIAS PARA OCUPAÇÃO PREDOMINANTE**

(Sector políticas)

- **Político:** indivíduo que, antes da sua nomeação já exercia a política como ocupação principal. Isso inclui cargos em câmaras legislativas, execuções de funções políticas e atividades relacionadas à militância e representação política, como ser vereador, deputado ou similar.

(Sector públicas)

- **Director / Alta AP:** indivíduo que, antes da sua nomeação, trabalhava na direção ou gestão dentro da administração pública, incluindo governos e agências públicas, com responsabilidade sobre a implementação de políticas públicas e decisões estratégicas.
- **AP:**
- **Funcionário:** indivíduo que, antes da sua nomeação, trabalhava como empregado do setor público (não ocupando cargos de direção ou alta gestão). Geralmente se refere a cargos administrativos, operacionais ou técnicos dentro da administração pública, mas sem exercer funções de liderança.
- **Juíza:** indivíduo que, antes da sua nomeação, trabalhava juíza no sistema judicial, seja em tribunais de diferentes instâncias ou especialidades.

(Sector privado)

- **Professor:** indivíduo que, antes da sua nomeação, trabalhava como docentes em instituições de ensino superior (universidades ou faculdades), independentemente da área específica de ensino. Pode incluir professores de diversas disciplinas acadêmicas.
- **Economista:** indivíduo que, antes da sua nomeação, trabalhava como economista no setor privado (ou no setor público de forma pessoal, ou seja, não como funcionário público), seja em consultoria, análise financeira, ou planejamento econômico.
- **Advogado:** indivíduo que, antes da sua nomeação, trabalhava como advogado, seja em empresas privadas, escritórios de advocacia ou mesmo no setor público (desde que não tenha vínculo formal com a administração pública, ou seja, não seja funcionário público).
- **CEOGestor:** indivíduo que, antes da sua nomeação, trabalhava na direção ou gestão de organizações privadas, como empresas, corporações ou ONGs. A função é tipicamente focada em gestão administrativa, financeira ou estratégica.
- **Empresário:** Indivíduo que, antes da sua nomeação, trabalhava como proprietário, fundador ou líder de uma empresa ou organização no setor privado.

## **B. SUBCATEGORIAS QUE NOS INTERESSA DETECTAR**

- **Político (Eurodeputado):** Subcategoria de *Político*, que se refere especificamente a indivíduos que foram deputados no Parlamento Europeu ou atuaram em outras funções políticas em uma instância europeia.

## **C. PARA CASOS DE MÚLTIPLAS OCUPAÇÕES PREDOMINANTES:**

Quando o indivíduo teve várias ocupações principais de forma simultânea (ou alternada de modo consistente), separar por um hífen (-), com a ocupação mais relevante ou predominante primeiro.

- **Político-Advogado:** Indivíduos que exerceram tanto a política quanto a advocacia de maneira simultânea (ou alternada de modo consistente), com a ocupação de político.



NOTA: PARA DIALOGAR COM A LITERATURA. A variável "expertise\_Job\_type" se diferencia de "educação" ou "profissão" (entendida como credencial educativa e.g. "advogado), e "carreira"

Víttori et al.
EDUCATION
Law
Economics
STEM
Social Science
Humanities
Medicine
Other
Career Background
High-ranking civil servant
Academic
Business executive
Law career
Diplomat
Medical doctor
Other

Costa Pinto e Tavares de Almeida
Área de formação
agronomia e veterinária
economia e gestão
letras e artes
engenharia e arquitectura
direito
matemática e naturais
medicina
militar
ciências sociais
Actividade profissional anterior
Juíz, procurador
Diplomata
Alta administração pública (DG, Comissão)
Funcionário público (não dirigente)
Quadro de grupo de interesses
Professor (não universitário)
Professor, investigador universitário
Administrador e Funcionário do Banco Central
Funcionário de Organização Internacional
Escritor, jornalista, artista
Médico, ciências da saúde
Advogado, notário
Engenheiro ou Arquitecto
Gestor
Proprietário rural
Político profissional
Empregado sector privado
Outro (diferente de: Alta adm pub; Adv; Gestor; Func de O.Intern.; Prof univ)

# MANAGERIAL EXPERTISE

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- **expertise\_managerial: MANAGERIAL EXPERTISE**

Did the minister have a relevant level of managerial expertise before being appointed?

**none:** The minister had NO managerial expertise

*[No managerial position]*

**some:** The minister had MODERATE managerial expertise

*[Short-term OR low-ranking managerial positions]*

**ample:** The minister had CONSOLIDATED and HIGH-RANK managerial expertise

*[Long-term AND high-ranking managerial positions]*

- **expertise\_managerial\_type: TYPE OF MANAGERIAL EXPERTISE**

What kind of managerial expertise?

**publica:** (Top management positions of public companies and organizations)

**private:** (Top management positions of private companies and organizations)

## GUIDING (managerial) POSITIONS

*(If you find other positions that fit our definition, let me know)*

*Build your story by referring to the MOST RELEVANT positions of your case.*

### TOP Managerial positions

- **A) Top political executive positions**
  - Minister of any area (Without Portfolio excluded)
  - *State Secretary*
  - Governor of a region
  - PM
  - (President of the Senate)\*
  - (President of the EU Parliament)\*
- **B) Top management positions of salient (public/private) companies and organizations**
  - Public
    - *Director of "National Department"*
    - Rector of a big Public university
  - Private
    - *CEO of big company*
    - *Director of a big Hospital*
    - Rector of a big Private
    - Presidents of professional associations at the national level (?)
- **C) Top party executive positions**
  - President of the party\*

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\* Parliaments or political parties are considered as complex organizations, to lead which requires managerial qualities

\*\* Ministers without portfolio do not have complex structure organization underneath, answering to and relying on the structure of the president of the council

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*Positions like ministers -and many others- are "multi" indicators (the same positions can be used to capture for both professional and managerial expert)*

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# PARTISANSHIP

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- **party\_weight: PARTY HEAVYWEIGHT [when appointed]**

A heavyweight is someone with effective party weight, a partisan with high decision-making power within the party regarding office, policy or votes (Muller & Strom 1999).

Was the minister a party **heavyweight**?

**yes**: the minister had high decision-making power within the party.

**no**: the minister had low or none decision-making power within the party.

- **party\_fast: FAST HEAVYWEIGHT [when appointed]**

Had the minister become a party **heavyweight exceptionally quickly** (equal or less than 1 legislature term)

**yes**: the minister had become a party heavyweight exceptionally quickly.

**no**: the minister had become a party heavyweight after a while within the party.

**not apply**: the minister was not a heavyweight.

- **party\_executive: EXECUTIVE PARTY POSITION [when appointed]**

["party in central office" de Katz & Mair 1993. Positional analysis(Putnam:15)]

**yes**: the minister was member of the party executive board.

**no**: the minister was not member of the party executive board.

- **partyness\_kind: TYPE OF PARTISAN [when appointed]**

Which of the labels proposed in the table "Types of Partisans" would best apply to the observed minister?

Standard types of partisans

**leader partisan**: the leader of the party.

**high-rank partisan**: a party heavyweight with consolidated membership.

**low-rank partisan**: a standard low-rank partisan.

**non partisan**: a standard non-partisan.

Some non-standard of unexpected types (use only if the standard types are missing something very important)

**fast-high partisan**: someone who become a party heavyweight exceptionally quickly.

**shadow partisan**: a non-partisan consistently acting on behalf of a given party.

(If none of them is close to the case, feel free to propose a new label with a justification).

- **partyShadow: PARTY OF SHADOW PARTISAN**

Name of shadow partisans' party (shadow partisans should have partyMin==no party)

## POLITICAL COMPETENCE

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- **politicness: LEVEL OF POLITICAL COMPETENCES**

Could you say that the minister had a relevant level of "politicness" (political competences) before becoming minister?

*none*: The minister had NEVER occupied a political position

*some*: The minister had occupied political position(s) for a SHORT TIME or of LOW RANK.

*ample*: The minister had occupied political position(s) for a LONG TIME and reaching a HIGH RANK.

What kind of political experience?

- **politicness\_leg\_nat: legislative national**
- **politicness\_leg\_loc: legislative local**
- **politicness\_leg\_eur: legislative European**
- **politicness\_exec\_nat: executive national**
- **politicness\_exec\_loc: executive local**
- **politicness\_exec\_eur: executive European**

## SEX & AGE

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- **woman: WOMAN**

*woman*:

*man*:

*other*:

- **born\_year: YEAR OF BIRTH**

*[VERY IMPORTANT: use internal format of the excel cell. Do not write yourself]*

- **born\_day: DAY OF BIRTH**

*[VERY IMPORTANT: use internal format of the excel cell. Do not write yourself]*