
Instructions for Recording Data from Indexes

This appendix contains the instructions used by persons recording data from newspaper indexes. Examples of how to classify events, the introductory statement, and the lists of index headings to use as a guide in searching the index are not included here. The latter is a several-pages-long list of industries, countries, and other subject headings.

A. What Types of Reported Actions to Record

1. Record any action indicative of labor unrest (see definition).
2. “Labor” includes wage workers and the unemployed (it does not include peasants, students, soldiers, communists, etc., but it does include agricultural wage laborers). In the case of actions by the unemployed, write “unemployed” in the industry column of the coding sheet.
3. Record actions even if they are only rumored, threatened, or planned, or if the report is that the action is completed and over. Also record actions that have been cancelled.
4. Record whether the act is referred to in an editorial, is a report of persons commenting on the action, or an analysis of the impact of the action (e.g., on the nation’s economy).
5. Reports of state action against labor should be recorded in the following way:
 - (a) If the index clause mentions a government action *only*, record it if it is indicative of labor unrest (e.g., anti-strike legislation, arbitration);
 - (b) If an index clause mentions *both* a labor action and a government action, do not record the government action unless:
 - (i) The government action indicates a state of siege, coup d’état, or martial law in response to labor unrest (government sending

Appendix B: Instructions for Recording Data

in troops can be interpreted as martial law; arrests should not be);

- (ii) The government action involves violence (e.g., police clash with strikers).

The intent of the foregoing rules is to record the government action on a separate line only if it is indicative of an escalation of a conflict involving labor. If you are unsure about how to code a government action, play it safe by recording it and writing out the exact words used in the index.

6. Do not record actions in the United States from the *New York Times* or ones in Great Britain from *The Times* (London).
7. Record acts in Puerto Rico, Ireland, and Northern Ireland from both indexes. Record on sheets separate from the United States and Great Britain, respectively.

B. Categories to Check in Newspaper Indexes

The entire index should be skimmed. Relevant entries can be found throughout. The following are the most likely categories under which relevant entries are found:

1. Labor
2. Labor unions
3. Strikes
4. Countries (read through index using attached list as advisory guide)
5. Industries (read through index using attached list as advisory guide)
6. Follow up all cross-references encountered

C. How to Use Data Recording Sheet

1. Use one coding sheet for each year for each country (unless there are more than thirty-five events for that country in a given year; if so, you will have to use more than one sheet).
2. Write your initials on top of sheet – after “coder.”
3. Use one line of the coding sheet for each mention of an act of labor unrest. Thus, if there are two events reported in a single article (e.g., strike *and* riot; strike in auto *and* strike in mines) use two lines of the coding sheet.

Appendix B: Instructions for Recording Data

4. Record an event *each* time there is a report on it, even if there is more than one article on that event in a given day, or if there are successive reports on the same event over a number of days, weeks, and so on.
5. The index page number should be recorded in the first column of the coding sheet; the date, page, and column number of the article should be recorded in the second column. The action type should be recorded in the third column, the location of the act in the fourth column, and the industry (if known) in the fifth column.
6. Record the country and year in the space provided at the top of the page.

D. Guidelines for the Recording of Action Types

1. General Strikes

- (a) Record as general strike whenever (and only when) the index uses the words “general strike.”
- (b) If it is a general strike in a particular industry, be sure to record the industry under “industry/occupation.”
- (c) One exception: if the index does not use the words “general strike,” you may infer it is a general strike only with reasonably strong evidence. The following two cases constitute reasonably strong evidence:
 - (i) The sandwich principle: report 1 – general strike called; report 2 – workers out; report 3 – general strike over. One may infer that report 2 is about a general strike.
 - (ii) Immediate follow-up report: report 1 – general strike called in Bari; report 2 – workers out in Bari.
Otherwise, record as a “strike,” not as a “general strike.”

2. Strikes. Record as strikes if the index refers to “strikes” without specifying what they are. However, if the index entry for the article specifies more than one specific strike (e.g., “auto, textile, and tramway workers strike,”) record this on three separate lines, each as a “strike,” and specify the industry for each of the three cases (i.e., 1 auto, 2 textile, 3 tramway).
3. Strike Wave. Record as “strike wave” if the index uses the words “wave of strikes” or “strike wave.”
4. Strike
 - (a) Strikes that do not fall into the above categories should be coded as “strike.”

Appendix B: Instructions for Recording Data

- (b) If a single article mentions strikes in more than one industry, be sure to give a separate line on the coding sheet to each strike and specify each industry.
5. Riot
 - (a) Record as a riot if the index specifies “riot.”
 - (b) Only record riots that are listed under labor or involve workers.
 - (c) Exception: record bread riots, food riots, housing riots, and anti-IMF riots even if workers are not mentioned, *but* write out the words “bread riot,” “housing riot,” and so on. Do not just write “riot” or the abbreviation “R.”
 - (d) When the index reports an event where there is violence, do not code as “Riot” unless the word “riot” is used. Instead, use the index’s exact wording (e.g., “strikers clash with police” or “violence at strike scene”). In addition, be sure to code two separate entries in such instances, i.e., on one line of the coding sheet record the “strike” and on the next line record the “violence” or “clash with police.”
 6. Unemployed Protest
 - (a) Under action, record the action engaged in by the unemployed (e.g., demonstrate, riot).
 - (b) Under industry, be sure to write “unemployed.”
 7. Protest, Dispute. Record as Protest or Dispute if the index uses the words “protest” or “dispute,” respectively.
 8. Demonstration. Record as demonstration if the index uses the word “demonstration.” If the index uses the word “rally,” you may record it as either rally or demonstration.
 9. Lockout. Record lockout if the index uses the word “lockout.”
 10. “Weapons of the Weak.” Record hidden forms of resistance such as absenteeism, shoddy workmanship, drunkenness or laziness *on the job*, using the abbreviation “WW” *and* then write out the action reported by the index.
 11. Other Actions. Record any other relevant action not listed here by using the words used by the index.
 12. Action-Type Abbreviations
 - (a) Ten standard abbreviations for action types are listed at the bottom of the coding sheet.
 - (b) If an action does not have a standard abbreviation, write out the action, taking from the index’s wording.

Appendix B: Instructions for Recording Data

- (c) You may create your own abbreviations, but you *must* note what your abbreviations mean at the bottom of the coding sheet in the space provided for notes.

E. Guidelines for Recording Location

1. Country
 - (a) Record country location of act in space provided at the top of the recording sheet.
 - (b) Record under the geographical entity given by the index (give separate sheets to, for example, Alsace-Lorraine or Silesia when these are distinct entities in the index). Do not attempt to use your own judgment and knowledge in assigning these to particular countries.
2. Sub-national Location. Record the city or region in which the action takes place (using the wording of the index) in the fourth column.

F. Guidelines for Recording Industry

1. If the act is industry-specific and is indicated in the index, record this in column six using the wording of the index.
2. If it is an act by the unemployed, write “unemployed” in the industry column.

G. Inferences

There are situations where you should infer a specific action type from the context of the index citations surrounding it. For example, it is common to find a clause referring to a specific action (e.g., general strike) followed by clauses that obviously refer to the same general strike, but that do not use the words “general strike.” In such cases, code the subsequent clauses as “general strike.” The following is a relevant example.

These entries appear on successive days:

Entry 1 – general strike called.

Entry 2 – gov’t–labor talks fail.

Entry 3 – state of emergency called after governor fails to end strike.

Entry 4 – strike is in 4th day.

Entry 5 – general strike continues.

Appendix B: Instructions for Recording Data

It is clear that each of these entries refers to the same general strike, particularly because they report on articles that appeared in the newspaper on successive days. Each entry should be recorded as “general strike.” And, by the rule of government action given in foregoing Section A5, entry 3 should be given two lines: (1) GS and (2) state of emergency. Likewise, entry 2 should be given one line and recorded as GS.