

Q

MMMR

Qualitative and Multi-Method Research

Spring 2020 | Volume 17-18 | Number 1

Inside:

- Letter from the Editor – Jennifer Cyr

Symposium: Comparative Areas Studies

- Contributors: Ryan Saylor, Amel Ahmed, Roselyn Hsueh, Nora Fisher-Onar, Marissa Brookes, Thomas Pepinsky

Symposium: When Locals Say You're Wrong: Member-Checking and Political Science

- Contributors: Allison Quatrini, Dvora Yanow, Peregrine Schwartz-Shea, Alyssa Maraj Grahame, Allison Quatrini, Nicholas Rush Smith

Original Article: Innovative Data Collection and Integration to Investigate Sorcery Accusation Related Violence in Papua New Guinea

Authors: Ibolya Losoncz, Miranda Forsyth, Judy Putt

In Memoriam: A Tribute to Kendra Koivu

- Contributors: Jennifer Cyr, Marissa Brookes, Anna Calasanti, Erin Kimball Damman, Christopher Day, James Mahoney, Jami Nelson-Nuñez, Sara Niedzwiecki, Fiorella Vera-Adrianzén

Longform APSA Awards (2019)

Table of Contents

Letter from the Editor

Jennifer Cyr - DOI: 10.5281/zenodo.3946782iii

Symposium: Comparative Area Studies**Comparative Area Studies: A Route to New Insights**

Ryan Saylor - DOI: 10.5281/zenodo.3946785 1

The Utility of Comparative Area Studies for Historical Analysis

Amel Ahmed - DOI: 10.5281/zenodo.3946792 7

Synergies of CAS: New Inquiries, Theory Development, and Community

Roselyn Hsueh - DOI: 10.5281/zenodo.3946799 10

Making Sense of Multipolarity: Eurasia's Former Empires, Family Resemblances, and Comparative Area Studies

Nora Fisher-Onar - DOI: 10.5281/zenodo.3946803 15

The Sweet Spot in Comparative Area Studies: Embracing Casual Complexity through the Identification of Both Systematic and Unsystematic Variables and Mechanisms

Marissa Brookes - DOI: 10.5281/zenodo.3946805 20

What's the "Area" in Comparative Area Studies?

Thomas Pepinsky - DOI: 10.5281/zenodo.3946807 22

Symposium: When Locals Say You're Wrong: Member-Checking and Political Science**Introduction**

Allison Quatrini - DOI: 10.5281/zenodo.3946811 27

My Participants Told Me I got it Wrong: Now What?

Dvora Yanow - DOI: 10.5281/zenodo.3946813 29

Member-Checking: Not a Panacea, Sometimes a Quagmire

Peregrine Schwartz-Shea - DOI: 10.5281/zenodo.3946815 39

"You're Asking the Wrong Question": Member-Checking during Fieldwork

Alyssa Maraj Grahame - DOI: 10.5281/zenodo.3946822 46

If My Participants say "You're Wrong," Does it Mean I really Am?

Allison Quatrini - DOI: 10.5281/zenodo.3946824 54

Member Checking: Lessons from the Dead

Nicholas Rush Smith - DOI: 10.5281/zenodo.3946827 60

Original Article: Innovative Data Collection and Integration to Investigate Sorcery Accusation Related Violence in Papua New Guinea

Ibolya Losoncz, Miranda Forsyth, Judy Putt - DOI: 10.5281/zenodo.3976055 66

In Memoriam: A Tribute to Kendra Koivu

Kendra was Everyone's Teacher

Jennifer Cyr - DOI: 10.5281/zenodo.3946830 75

Dance Lessons

Marissa Brookes - DOI: 10.5281/zenodo.3946834 76

No Causality without Correlation: On Learning from Kendra Koivu

Anna Calasanti - DOI: 10.5281/zenodo.3946840 77

On the Loss of a Dear Friend

Erin Kimball Damman - DOI: 10.5281/zenodo.3946842 78

Kendra Koivu: One of my Favorite People

Christopher Day - DOI: 10.5281/zenodo.3946845 79

Kendra Koivu: Remembering a Qualitative Methodologist

James Mahoney - DOI: 10.5281/zenodo.3946849 81

Sisu

Jami Nelson-Nuñez - DOI: 10.5281/zenodo.3946853 82

Kendra Koivu: A Brilliant Methodologist and a Dear Friend

Sara Niedzwiecki - DOI: 10.5281/zenodo.3946855 84

Kendrachaychik Ñuqanchikwan Tukuypuni (Our Dear Kendra, With Us Always)

Fiorella Vera-Adrianzén - DOI: 10.5281/zenodo.3946863 86

Longform APSA Awards (2019)

DOI: 10.5281/zenodo.3946899 88

Letter from the Editor

APSA-QMMR Section Officers

President:

Jason Seawright
Northwestern University

Vice-President:

Henry Hale
George Washington University

Secretary-Treasurer:

Colin Elman
Syracuse University

QMMR Editor

Jennifer Cyr
University of Arizona

Executive Committee Members

Tasha Fairfield
London School of Economics
(2018-2020)

Yuen Yuen Ang
University of Michigan
(2018-2020)

Sara Goodman
University of California-Irvine
(2019-2021)

Joe Soss
University of Minnesota
(2019-2021)

2020 Nominating Committee Members:

Alison Post
University of California-Berkeley

Sebastian Dellepiane
University of Strathclyde

Markus Kreuzer
Villanova University

2020 Division Chair

Sara Niedzwiecki
University of California, Santa Cruz

The approaches we take to carrying out qualitative and mixed methods research are multiple. There is no one “right” way, at least not yet. Indeed, I am not sure there should be. The methods with which we engage—even those that have attained the status of “best practice”—deserve to be viewed critically from time to time.

Take, for example, the comparative method, or the “systematic analysis of a small number of cases” (Collier 1993, 105). Historically, this kind of small-n comparison has involved selecting from a set of cases located in the same geographical space (e.g., Latin America, Sub-Saharan Africa, or Western Europe). Nowadays, however, a non-trivial percentage of books compare a small set of cases *across* regions. Our first symposium below examines this kind of research, characterized as Comparative Area Studies (CAS). CAS differs from within-region, small-n research in several ways. For example, regional specialists typically leverage country similarities to control for context. CAS, by contrast, asks scholars to take context seriously, compelling them to think carefully about concepts, measures, and coding. The symposium considers what is novel and innovative about cross-area comparison, while also considering its implications for the comparative method in general.

What about qualitative data collection methods? These merit scrutiny and engagement as well. I rarely encounter a graduate student of my own who does not ask for guidance on how to undertake fieldwork and, in particular, interviews. Political science, as a discipline, often assumes that qualitative scholars will know how to carry out an interview when the time comes to do fieldwork. But this is not a skill we have innately. Asking the right questions is no easy task; understanding the answers is equally difficult. The second symposium deals with the latter question: How do we know if we have appropriately “heard” our interview subjects? How do we know if we’ve correctly interpreted their responses to our queries? One way to verify and validate the results of our research is to share them with our subjects directly. This practice of “member-checking” is increasingly important in the social sciences, but it is not without controversy. The second symposium below considers a range of issues associated with member-checking, considering, above all else, what happens when your research and your research subjects do not necessarily agree.

Often, the questions underlying the practice of mixed methods are less about how to carry out different kinds of methods (although this is certainly important) and more about how to bring these methods together to advance knowledge on a singular topic or question. The third contribution to this issue is an original article on how to integrate a series of methods used across a multi-site research project on Sorcery Accusation Related Violence (SARV) in Papua New Guinea. It is often the case that our research has many moving parts. This article offers an innovative approach to managing multiple types of data coming from several different places. It also provides a fascinating account of a project that delves into the shocking and sensitive topic of SARV.

Finally, our last set of essays remembers the inimitable Kendra Koivu, who passed away in early fall 2019. Kendra was a serious methodologist who had made her mark on the study of qualitative and mixed methods as a junior scholar. Our tribute to her examines the impact she had on her colleagues, her students, her friends, and the discipline as a whole. A bit of a spoiler: Her impact was great. Indeed, Kendra was well on her way to pushing the study of methods forward in her own right. See, for example, her help in coining the term, SUIN, a now common type of condition utilized in Qualitative Comparative Analysis.

It goes without saying—but I will say it anyway—that Kendra’s presence in the study of qualitative and mixed methods will be greatly missed. In this issue, QMMR celebrates her contributions and also mourns her passing.

Jennifer Cyr
jmcyr@email.arizona.edu

References

Collier, David. 1993. “The Comparative Method.” In *Political Science: The State of the Discipline, II*, edited by Ada W. Finifter, 105-19. Washington, DC: American Political Science Association.

Symposium:

Comparative Area Studies Symposium

Qualitative and Multi-Method Research

2020, Vol. 17-18, No. 1

[https://DOI: 10.5281/zenodo.3946785](https://doi.org/10.5281/zenodo.3946785)

Comparative Area Studies: A Route to New Insights

Ryan Saylor
University of Tulsa

Two trends stand out in contemporary political science. Some researchers are assembling ever-better global datasets (e.g., Coppedge et al. 2019), while others are conducting sophisticated experiments and other micro-level analyses within single countries (Pepinsky 2019). Alongside these trends, the 2018 volume *Comparative Area Studies: Methodological Rationales and Cross-Regional Applications* (Ahram, Köllner, and Sil) underscores the vitality of small- and medium-N case study research. Most notably, the volume advocates for cross-regional research. This symposium seeks to extend a burgeoning dialogue regarding the virtues, promises, and challenges associated with comparative area studies (Sellers 2019).

The symposium gathers six essays. Two, written by Amel Ahmed and me, are from contributors to the volume. Ahmed describes how comparative area studies can promote an ethnographic sensibility and enable researchers to better understand their historical subjects. I preview my essay in the next paragraph. The next two articles, written by Roselyn Hsueh and Nora Fisher-Onar, come from scholars whose research has affinities with comparative area studies. Hsueh documents a variety of examples of innovative research on China, which contrast the Chinese case in fresh and unusual ways. Fisher-Onar examines how comparative area studies might elucidate the emerging multipolarity in the world, by exploring how countries with imperial histories (China, Russia, Iran, and Turkey) are striving to expand their power. The final two essays, by Marissa Brookes and Thomas Pepinsky, critically appraise comparative area studies and suggest ways to sharpen it. Brookes thinks comparative area studies research could be strengthened if researchers better explicated their underlying logic of

causal inference, particularly by specifying if key variables constitute, for example, an “INUS” condition. Pepinsky presses practitioners to rethink what distinguishes an “area” as such and to consider whether our geographic conceptualizations should be replaced by alternative constructs.

In this first essay, I provide an overview of comparative area studies. I describe its distinctive features, identify its affinities with causal explanation, and provide a way that one can begin comparative area studies research. I first report some key characteristics of comparative area studies: a methodological imperative for cross-regional research, a practical desire to engage area specialists, and an embrace of epistemic diversity. In the second section, I describe how comparative area studies can help researchers explain outcomes in multiple cases, rather than using case studies as tests of a broad inferential pattern. Researchers can achieve causal explanation by comparing cases to an ideal type, which encapsulates general causal claims and can thereby help researchers explain why individual cases turned out as they did. This approach renders an alternative outlook on case selection that neutralizes common methodological concerns about cross-regional comparisons. The third section offers guidance to start doing comparative area studies, specifically by synthesizing the region-specific conventional wisdoms that surround one’s research question. Incidentally, for those readers who are unfamiliar with the edited volume, I want to mention that the first section is mainly a summary of comparative area studies. The second and third sections are more my personal take, and the volume’s editors or contributors do not necessarily share these views.

What Comparative Area Studies Is

There are methodological, practical, and epistemic dimensions to comparative area studies. The most obvious methodological aspect is that it is cross-regional. Such research designs are uncommon: Patrick Köllner, Rudra Sil, and Ariel Ahram (2018, 17) estimate that just 15 percent of the principally small-N comparative politics books that were reviewed in *Perspectives on Politics* between 2006 and 2013 had case studies from more than one region. So one reason that comparative area studies highlights cross-regional research is because it is relatively rare, which may diminish our awareness of its virtues.

Yet a more compelling reason to promote cross-regional research is substantive. Studying a phenomenon in different regional contexts may pose vexing challenges that yield novel insights, as one struggles to make sense of the commonalities and differences within and between world regions. In addition, cross-regional research can prompt us to reconsider conventional wisdoms that have taken hold within area studies communities, as well as among area-oriented political scientists. Later, in the third section of this article, I consider how engaging these region-specific conventional wisdoms can produce new conceptual and explanatory insights, and ultimately alter the analytic frameworks we use to understand the world around us.

A second methodological feature of comparative area studies is its requirement to pay close attention to context. This imperative is not the first plea regarding the importance of context. For example, Tullia Falleti and Julia Lynch (2009) consider how contextual factors influence the operation of causal mechanisms, and how contextual variation can induce mechanisms to behave differently and produce dissimilar outcomes. In this way, Falleti and Lynch regard context as something that exists independently of a theoretical hypothesis and its attendant causal mechanisms. By contrast, comparative area studies seeks to harness contextual nuance in a more thoroughgoing way. This process involves a “self-conscious effort to adjust the operationalization of concepts, the calibration of measures, and the coding of observations for each case in light of contextual attributes deemed significant by the relevant country or area specialists” (Sil 2018, 233). Catherine Boone’s (2003, 354-57) research on institutional frameworks in West Africa provides a region-specific illustration of how such considerations can produce rich concepts and complex measurement schemes. So although comparative area studies practitioners value general concepts and theoretical debates, sometimes including the desire

to find “portable mechanisms and causal processes” (Köllner, Sil, and Ahram 2018, 3, 14), contextual factors are not an afterthought. Instead, practitioners believe that “differences in context conditions need to be granted the same theoretical status as those recurrent mechanisms or linkages that are portable” (Sil 2018, 235).

The entreaty to take context seriously relates to one of comparative area studies’ practical imperatives. Adherents of comparative area studies strive to appreciate contextual nuance in part by engaging area specialists and their debates. Too often, political scientists remain sequestered from area studies communities. This distance may negatively affect the richness of our case studies. But beyond the potential improvement of a research product, there is a wider communal benefit that may come from engaging area specialists. In my experience, historians and area specialists have seemed genuinely interested to learn about my research topics and, through their probing, have helped reveal conceptual or other ambiguities that may not have occurred to interlocutors with my disciplinary background. Many of those reading this piece have undoubtedly had similar experiences. Thus one practical feature of comparative area studies is dialogical: a desire to make cross-disciplinary engagement commonplace (Sil 2018, 239).

Engagement with area studies communities has potential pitfalls, however. As Lustick (1996) emphasizes, secondary sources are products of how a historian or area specialist interprets the past. They use an implicit framework in their quest to identify the pertinent facts as such (cf. Trachtenberg 2009). Thus when social scientists use these materials, they are not harnessing a neutral and dispassionate record but are drawing on disputable materials. Similarly, area studies specialists often gravitate toward idiographic understandings of their research matter and may be skeptical of comparative research designs. The project of comparative area studies encourages researchers to be aware of and embrace these challenges, in order to enrich their understanding of a case’s context and the scholarly debates that surround it (Sil 2018, 235).

For example, Amel Ahmed (this issue) discusses how comparative area studies may help us understand historical actors as they understood themselves and their endeavors, rather than projecting our contemporary impressions of their predicaments onto them. Cross-regional research may assist our quest to empathize with and understand actors in seemingly disparate contexts. Yet as Thomas Pepinsky (this issue) makes plain, just what constitutes an area and how those conceptualizations

ought to frame our research are far from settled issues. An “area” may be less geographically bounded than one might think initially. In different ways, Pepinsky, Ahmed, and Nora Fisher-Onar (this issue) raise fundamental questions about how and why we identify world regions as such, and whether those constructs are the most fruitful way to organize unconventional comparisons.

A second practical imperative of comparative area studies is to examine substantively important phenomena, often with special attention to macro-level factors. My sense is that some practitioners of comparative area studies want to be the standard-bearers of macro-structural research on topics such as democratization, political order, and revolution. There is an intellectual heritage to books such as—to cite a few cross-regional examples—Barrington Moore’s *Social Origins of Dictatorship and Democracy*, Samuel Huntington’s *Political Order in Changing Societies*, and Theda Skocpol’s *States and Social Revolutions*. Indeed, Roselyn Hsueh (this issue) documents an affinity between comparative area studies and how innovative scholars have juxtaposed the Chinese case in new ways. Yet comparative area studies is not inherently disposed toward country-level, macro-structural research. For instance, Benjamin Smith’s (2018) contribution to the volume compares separatist conflicts in areas that straddle country borders: greater Kurdistan in the Middle East, the Baloch region in Southwest Asia, and the Tuareg region in North Africa. The research involves surveys and interviews, not macro-structural analysis, although the historical backdrop of the chapter is a macro-political process (post-imperial partitions). Overall, while the discipline has shifted toward case studies analyzing micro-level causal processes (Pepinsky 2019), comparative area studies helps preserve case-based research that is focused on macro-level factors and rich in historical detail.

In describing the features of comparative area studies, I think it is important to note two things that it is not. First, the demand to compare cases from multiple regions is not borne out of a desire to “increase the N” in order to see if the insights generated from the study of one region will “travel” to another. If it were, then one’s case studies would become tools that are used to test a nomothetic inference (see Köllner, Sil, and Ahram 2018, 11, 15; Sil 2018, 226–27, 232). And comparative areas studies would be epistemically indistinguishable from standard multi-method research; sure, the tools would differ (cross-regional cases studies rather than large-N analysis), but the two approaches would share the same neopositivist wellspring (Jackson 2011, 67–71).

Comparative area studies is not tethered to a particular epistemic project, because its advocates recognize “the epistemological heterogeneity of qualitative research” (Sil 2018, 227).

Instead, and second, comparative area studies embraces epistemic diversity. That means some people employing comparative area studies may very well conceive of their work in neopositivist terms, and some of the chapters in the edited volume could qualify as such. Marissa Brookes (this issue) offers methodological advice to enhance these types of comparative area studies. But the emphasis on contextual sensitivity also makes comparative area studies compatible with some forms of ethnographic research. For instance, Erica Simmons and Nicholas Rush Smith (2019) identify a variety of benefits to be had from comparative ethnography, including detecting commonalities across cases, preventing unwarranted extrapolations of findings from a single case, and sharpening theories and concepts. The spirit of comparative area studies shares much with comparative ethnography. Calvin Chen (2018) illustrates these affinities in his study of how Chinese businesspeople imported their Wenzhou model into Italy in recent years. A third approach to comparative area studies (from this non-exhaustive list) is research that focuses on explanation, rather than interpretation or inference. I describe this research avenue in greater detail in the next section. In sum, comparative area studies has epistemic, practical, and methodological features that help qualify it as a distinctive approach to social science.

Comparative Area Studies Produces Context-Sensitive Explanations

In this section, I describe how comparative area studies can be employed toward the goal of explaining cases. This section draws on my related article (Saylor, forthcoming). As I mention above, comparative area studies is not an approach that seeks to increase the N by adding case studies from one region to see if they corroborate a theory that was originally applied to cases from another region. (If we think of comparative area studies in this way, it ceases to have much distinctiveness.) When one uses case studies to see if they fit a broad cross-case pattern, the case studies serve as tests of an empirical regularity. One is trying to make a causal inference: the process of scrutinizing a theoretical premise with data (Waldner 2007, 150). The requisites for causal inference have long plagued unconventional comparisons. For example, Skocpol and Somers (1980, 191) criticize the “parallel demonstration of history”—in

which one juxtaposes cases to repeatedly show a theory's usefulness—because it does not establish controls and can therefore “only illustrate” but “not validate” a theory. Yet not all social science is oriented to making causal inferences.

Alternatively, one can fruitfully employ comparative area studies to explain cases. An explanation is distinct from an inference. An explanation describes what caused something to happen: it is a statement about how a cause manipulated something and produced its effect (Jackson 2017). One way to explain the outcomes of particular cases is to examine them in relation to an ideal type. Ideal types are deliberate oversimplifications of empirical reality. They can facilitate explanation by forcing researchers to determine, for “each individual case, the extent to which [an] ideal-construct approximates to or diverges from reality” (Weber 1949, 90). Ideal types are not hypotheses to be tested by individual case studies, but rather they are constructs that can help render particular cases intelligible (Jackson 2011, 112-15, 141-55).

Ideal types help researchers explain cases in a few ways. First, they direct our attention; ideal types are things against which the empirical facts of a case can be juxtaposed. Second, when applied to the actual facts of a case, ideal types can reveal the extent to which they account for the permutation of that case. Third, researchers can then identify the other factors that were not described by the ideal type, but which form part of the explanation of how and why a case turned out as it did. Ideal types facilitate explanations of individual cases.

This third aspect of what ideal types can do is where the affinity between explanation, ideal types, and comparative area studies becomes clearer. When one lists the factors that helped shape the outcome of a particular case, but which were not captured by the ideal type, one is adjusting for context. Indeed, Köllner, Sil, and Ahram (2018, 16) write that “what distinguishes (comparative area studies) is the idea that the context conditions across two or more regions—and of countries and locales within those regions—may encompass similarities and differences that affect the operation of more general causal processes and mechanisms.” Put differently, an ideal type may describe how some general causal process might operate in an overly simplified world, while contextual sensitivity can elucidate how and why that process played out as it did (or failed to do so) in an individual case.

Boone's (2003) research on state institutions in rural Africa displays these principles. She argues that variations in communal and class structures influenced

how rulers built state institutions in the countryside. Boone mentions that she wants to identify “a set of ‘ideal type’ variations in rural social organization” and their effects on institution building (323). When one case, the Korhogo region in Côte d'Ivoire, does not conform to her model's expectations, Boone forthrightly discusses the idiosyncratic reasons why it does not (244-45). She is adjusting for context. Her explanations persuade because they couple ideal-typical claims with contextual analysis.

Another way that ideal types can assist comparative area studies is with respect to case selection. When researchers use case studies as tests of a broader cross-case pattern, they usually justify case selection in terms of how their cases score on certain variables and whether a case is representative of a larger population of interest. Mill's method of difference, which pairs cases that are similar in many ways but differ on an explanatory variable, is the most common strategy of case selection (Koivu and Hinze 2017). Standard criteria for case selection often imperil cross-regional research. By contrast, because ideal types do not profess to represent actual empirical regularities, but rather ideal-typical causal claims, one can be freed from these case selection strictures. Instead, one can select cases that seem relatable—that is, pertinent and applicable—to an ideal type. Then, the case study itself will reveal whether the ideal type is useful for explaining the facts of the case. Basic contextual similarity can serve as an alternative basis for case selection.

Consequently, in ideal types, practitioners of comparative area studies can find a robust justification for making cross-regional comparisons, even when those comparisons contravene standard prescription on case selection. No longer would researchers succumb to the need to demonstrate “control” over a host of variables, a fundamental aspect of the conventional wisdom on case selection that inhibits comparative area studies (cf. Köllner, Sil, and Ahram 2018, 18). Not only does my approach to case selection facilitate comparative area studies, it also better aligns with the epistemic goals of those researchers who want to produce explanations.

Starting Comparative Area Studies by Appraising Region-Specific Conventional Wisdoms

This final section provides one way that scholars can begin to engage in comparative area studies. I encourage scholars to survey, compare, and synthesize the region-specific conventional wisdoms that surround their research topic. It is a first step to developing a conceptual and theoretical framework that may render intelligible

how your phenomenon of interest has unfolded in a cross-regional contrast space. I think this discussion is best presented through an applied example, so I reference my chapter in the edited volume, which draws on a larger book project (Saylor 2014).

My research analyzed how natural resource booms and different types of political coalitions affected state building in Latin America and Africa (three countries from each region: Argentina, Chile, and Colombia; Ghana, Mauritius, and Nigeria). The simplest summary of the argument and outcomes is that when commodity booms enriched social actors both within and outside of the ruling coalition (Argentina and Chile), more state building occurred than when booms enriched actors who were solely within or outside of the ruling coalition.

At an early point in the project, I surveyed the literatures on state building in each region. In Latin America, the formative state building era was during the period of “outward expansion” (ca. 1850-1900), when Latin American states were strengthening their connections to the world economy. Many studies, epitomized by dependency theory, framed scholarly thought by analyzing the extent to which export elites dictated policy and state building in a given country. Hence, state building was seen as something of a functional outgrowth of deepening economic links. By contrast, the crucial era for state building in Africa came after World War II (ca. 1945-65), when urban nationalist movements gained power. These leaders often installed policies of urban bias and elaborated “neopatrimonial” forms of rule. These respective paradigms do not comprise all accounts of state building in these regions, but in my estimation they are the archetypal themes.

At first blush these conventional wisdoms seem to have little in common. But a virtue of comparative area studies is that I was compelled to compare these conventional wisdoms to each other and to cases from each region. I juxtaposed not only the discrete arguments, but also the conceptual frames that implied how researchers ought to think about these phenomena. These comparisons were not methodologically novel—I am sure many readers have done similar things in their own work—but they are nonetheless worth highlighting.

The conventional wisdom on Latin America led me to learn that most African countries also experienced massive commodity booms during their formative state building eras. And the conventional wisdom on Africa helped me appreciate that the types of economic interests encapsulated within ruling coalitions (if any) mattered greatly. Whereas the literature on Latin America parsed differences in export elites at the helm of countries, the literature on Africa laid bare the consequences of having ruling coalitions that did not include actors with direct stakes in exporting. These region-specific conventional wisdoms helped me look at cases from another region from a different viewpoint.

I combined aspects of these conventional wisdoms together in order to relate these cases to each other, develop explanations of their individual trajectories, and pay attention to local context. The cross-regional nature of my comparisons enabled me to interpret cases that are often regarded as regional oddities (Colombia, Mauritius) as having features regularly observed in another region. By design, comparative area studies forces us to reappraise region-specific conventional wisdoms and create a dialogue between literatures. This process is not unique to comparative area studies—a researcher doing good work on one region is usually versed in the basic lessons from research on another region—but comparative area studies may impel researchers to go further than they otherwise might, and these endeavors may yield insights that are presently beyond our grasp.

Overall, the promise of comparative area studies comes not from its methodological novelty but rather from its pluralism. Comparative area studies allows researchers to embrace the fact that context does matter, and in ways that are often not reducible to the variable-oriented thinking prevalent in much contemporary political science. Yet practitioners of comparative area studies also seek to harness general theoretical insights and cutting-edge thinking on causal mechanisms. Thus comparative area studies aims to strike a delicate balance. This goal may be achieved not by conceiving of comparative area studies as a means for causal inference, but rather as something best suited to producing causal explanations.

References

- Ahram, Ariel I., Patrick Köllner, and Rudra Sil, eds. 2018. *Comparative Area Studies: Methodological Rationales and Cross-Regional Applications*. New York: Oxford University Press.
- Boone, Catherine. 2003. *Political Topographies of the African State: Territorial Authority and Institutional Choice*. Cambridge: Cambridge University Press.

- Chen, Calvin P. 2018. "Organizing Production Across Regions: The Wenzhou Model in China and Italy." In *Comparative Area Studies: Methodological Rationales and Cross-Regional Applications*, edited by Ariel I. Ahram, Patrick Köllner, and Rudra Sil, 204-21. New York: Oxford University Press.
- Coppedge, Michael, John Gerring, Carl Henrik Knutsen, Staffan I. Lindberg, Jan Teorell, David Altman, Michael Bernhard et al. 2019. V-Dem dataset (Version 9), Varieties of Democracy Project. Last modified June 3, 2019. <https://doi.org/10.23696/vdemcy19>.
- Falleti, Tulia G., and Julia F. Lynch. 2009. Context and Causal Mechanisms in Political Analysis. *Comparative Political Studies* 42, no. 9 (September): 1143-66.
- Huntington, Samuel. 1968. *Political Order in Changing Societies*. New Haven: Yale University Press.
- Jackson, Patrick Thaddeus. 2011. *The Conduct of Inquiry in International Relations: Philosophy of Science and its Implications for the Study of World Politics*. New York: Routledge.
- . 2017. "Causal Claims and Causal Explanation in International Studies." *Journal of International Relations and Development* 20, no. 4 (October): 689-716.
- Koivu, Kendra, and Annika Hinze. 2017. "Cases of Convenience? The Divergence of Theory from Practice in Case Selection in Qualitative and Mixed-Methods Research." *PS: Political Science & Politics* 50, no. 4 (October): 1023-27.
- Köllner, Patrick, Rudra Sil, and Ariel I. Ahram. 2018. "Comparative Area Studies: What It Is, What It Can Do." In *Comparative Area Studies: Methodological Rationales and Cross-Regional Applications*, edited by Ariel I. Ahram, Patrick Köllner, and Rudra Sil, 3-26. New York: Oxford University Press.
- Lustick, Ian. 1996. "History, Historiography, and Political Science: Multiple Historical Records and the Problem of Selection Bias." *American Political Science Review* 90, no. 3 (September): 605-18.
- Moore, Barrington. 1966. *Social Origins of Dictatorship and Democracy: Lord and Peasant in the Making of the Modern World*. Boston: Beacon Press.
- Pepinsky, Thomas. 2019. "The Return of the Single Country Study." *Annual Review of Political Science* 22 (1): 187-203.
- Saylor, Ryan. 2014. *State Building in Boom Times: Commodities and Coalitions in Latin America and Africa*. New York: Oxford University Press.
- . Forthcoming. Why Causal Mechanisms and Process Tracing Should Alter Case Selection Guidance. *Sociological Methods & Research*. <https://doi.org/10.1177/0049124118769109>.
- Sellers, Jeffrey M. 2019. Review of *Comparative Area Studies: Methodological Rationales and Cross-Regional Applications*, edited by Ariel I. Ahram, Patrick Köllner, and Rudra Sil. *Perspectives on Politics* 17, no. 2 (June): 597-98.
- Sil, Rudra. 2018. "Triangulating Area Studies, Not Just Methods: How Cross-Regional Comparison Aids Qualitative and Mixed-Method Research." In *Comparative Area Studies: Methodological Rationales and Cross-Regional Applications*, edited by Ariel I. Ahram, Patrick Köllner, and Rudra Sil, 225-246. New York: Oxford University Press.
- Simmons, Erica S., and Nicholas Rush Smith. 2019. "The Case for Comparative Ethnography." *Comparative Politics* 51, no. 3 (April): 341-59.
- Skocpol, Theda. 1979. *States and Social Revolutions: A Comparative Analysis of France, Russia, and China*. Cambridge: Cambridge University Press.
- Skocpol, Theda, and Margaret Somers. 1980. "The Uses of Comparative History in Macrosocial Inquiry." *Comparative Studies in Society and History* 22, no. 2 (April): 174-97.
- Smith, Benjamin. 2018. "Comparing Separatism Across Regions: Rebellious Legacies in Africa, Asia, and the Middle East." In *Comparative Area Studies: Methodological Rationales and Cross-Regional Applications*, edited by Ariel I. Ahram, Patrick Köllner, and Rudra Sil, 168-84. New York: Oxford University Press.
- Trachtenberg, Marc. 2009. *The Craft of International History: A Guide to Method*. Princeton: Princeton University Press.
- Waldner, David. 2007. "Transforming Inferences into Explanations: Lessons from the Study of Mass Extinctions." In *Theory and Evidence in Comparative Politics and International Relations*, edited by Richard N. Lebow and Mark Lichbach, 145-75. New York: Palgrave Macmillan.
- Weber, Max. 1949. *The Methodology of the Social Sciences*. Translated and edited by Edward Shils and Henry A. Finch. Glencoe: Free Press.

The Utility of Comparative Area Studies for Historical Analysis

Amel Ahmed

University of Massachusetts, Amherst

While focusing on particular countries or regions is indispensable for accumulating substantive knowledge, there are also costs to not stretching beyond a given geographic region when taking on “big” questions in the study of politics. The recent volume, *Comparative Area Studies: Methodological Rationales and Cross-Regional Applications* (Ahram, Köllner, and Sil 2018) identifies comparative area studies (CAS) as a distinct research strategy occupying unique intellectual spaces within the social sciences. As the contributions to the volume demonstrate, CAS has distinct advantages for developing mid-range theory, offering novel empirical findings and a different mode of triangulation. Such works can also serve an important disciplinary function by bringing into dialogue scholars that may be siloed off into various research communities. Moreover, they advance an important intellectual agenda in offering a mode of research that problematizes and denaturalizes our conceptions of geographical areas, and indeed, our understanding of what it means to compare.

In this essay I wish to develop further a dimension of the CAS framework that is acknowledged but not adequately treated within the volume: the utility of a comparative area studies sensibility for historical analysis. The basic intuition of the CAS framework, which is to question the notion of an “area” or the assemblage of cases that constitute a theoretically relevant unit of analysis, is critically important for historical research. This is because both our conventional understandings of areas and disciplinary conventions around area studies are situated in specific cultural and historical contexts that may not translate to the period under investigation. Thus looking across areas or bringing insight gleaned from one area to bear on the study of another opens important new avenues for the study of political development.

Social scientists have for some time been admonishing us to “read history forward,” emphasizing the need to take seriously actors’ subjective understandings of their situations and the context in which they are fighting their fights (Pierson 2004; Kreuzer 2010; Capoccia and Ziblatt, 2010; Ahmed 2010). An attentiveness to subjectivity has been central to efforts to revive historical

scholarship within the social sciences and much of the focus has been on time and temporalities. This has included work on sequencing, critical junctures, and also actors’ perception of the tempo of events (Mahoney and Reuschemeyer 2003; Pierson 2000; Cappocia and Keleman 2007; Grzymala-Busse 2011).

In addition to this emphasis on time, something that is critically important for historical analysis, but less thoroughly examined, is an appreciation of subjectivity with respect to actors’ understanding of the political space in which they are operating. Geography is surely one element of this, but, just as surely, geography is not determinative of what constitutes an area or region. Indeed, many scholars have questioned not only the construction of areas and regions as political entities (Holbig 2017; Fawn 2009), but also the physical geography on which these constructions are based (Wiggen and Lewis 1997; Schulten 2001).

Geographic demarcations themselves are politically informed at the same time that they inform our politics. It is for this reason, for instance, that Haiti can be imagined as part of Africa, while Turkey remains beyond the boundaries of Europe: In 2016, the African Union (AU) considered and voted on the inclusion of Haiti in the African Union. And while the bid was ultimately unsuccessful, it exemplifies the ways in which the geographical imagination need not correspond to accepted physical boundaries. It also led to several initiatives to deepen ties between the AU and the African Diaspora, defined as “the communities throughout the world that are descended from the historic movement of peoples from Africa” (quoted in Amao 2018, 50). In contrast, negotiations for Turkey to join the European Union, which began in 2005, continued for a decade and ultimately stalled out for failure to meet the political requirements for membership (Ugur 2010).

The challenge of developing a grounded conceptualization of regions is compounded in historical research because we often bring contemporary understandings of what constitutes a theoretically significant “area” to our research about historical phenomenon. We are often deceived by what Skinner

referred to as a sense of “familiarity” when reading historical texts. On this he wrote:

It is the very impression of familiarity, however, which constitutes the added barrier to understanding. The historians of our past still tend, perhaps in consequence, to be much less aware than the social anthropologists have become about the danger that an application of familiar concepts and conventions may actually be self-defeating if the project is the understanding of the past. (Skinner 1970, 136)

Overcoming this sense of familiarity requires something akin to an ethnographic sensibility (Schatz 2009; Simmons and Smith 2017). It is telling that Skinner compared the task of a historian to that of an anthropologist. Both need to develop modes of “seeing” that are different from those used to navigate familiar contexts. Building on this, Schaffer (2016) has offered the technique of “locating” concepts as a way to disrupt familiarity across both different ages and languages (55). Locating actors’ sense of political space historically is challenging for all the reasons noted above, but central to the effort is the need to problematize the familiar in terms of our understanding of areas.

The temptation to see the familiar in the past may vary depending on the place and time. For the historical context I am most familiar with, nineteenth-century Europe, this slippage is quite easy because the political geography remains more or less unchanged. So it may be possible to imagine that the idea of Germany today is what it was then, or that the physical geographical boundaries of Europe constituted the relevant political demarcations of space. These projections of the familiar onto the past would be very problematic given that German unification did not happen until 1871 and would remain contested for decades after. In addition, Europe of the nineteenth century was understood by many to extend to colonial spaces, especially with regard to the settler colonies. But there is a danger even with historical periods and places that may seem self-evidently different. As Schaffer demonstrates, Skinner himself has been guilty of this homogenizing tendency in his discussion of “originality” in the work of Milton (Schaffer 2016, 64-67).

With respect to our conceptions of space, the challenge is often a daunting one given that specific notions of geographic areas are built into our discipline. Even with the ebb and flow of area studies as separate fields, entrenched ideas about where a given politics

begins and ends are embedded in the organization of the academy. Organization such as the Latin American Studies Association, the Council for European Studies, the Middle East Studies Association and so on, provide opportunities to continually question the construction of regions, but also serve to maintain the prevalent practices of regional delineation. This is often reinforced by disciplinary conventions and training that starts very early on. A paper that comes out of a seminar on Western Europe becomes an article or a dissertation on Western Europe. And because the decision often happens at early stages of research, it can silo off important avenues for exploration.

Approaching questions with a sensitivity to actors’ subjectivity requires that we question contemporary understandings of political geography and investigate what, for the actors in question, is the relevant sense of political space. The CAS framework moves us helpfully in this direction. With such an approach, researchers can leverage deep contextual understandings of particular locales to creatively configure research strategies that stretch beyond specific area specialties. To be sure, CAS also requires notions of areas, and those too will be constructions. This is inescapable. But in breaking out of the typical regional delineations it invites greater reflexivity with regard to the way in which areas are deployed in our research. It reminds us that the answers to our question about Europe may not be found in Europe and that we may need to look elsewhere to even understand what Europe means in that context. That reminder in itself may help to disrupt our sense of familiarity.

This is a lesson that I have learned from my own efforts to understand the origins of electoral systems in nineteenth-century democracies (Ahmed 2013). Limiting the investigation to Europe left a fragmented picture of the dynamics of electoral system choice. Widening the scope to look at the settler colonies, and especially the United States, gave new purchase on the question. The move to incorporate the US in the study was not motivated initially by methodological considerations or a deductive logic of comparison, though the case did add great leverage in these respects as well. Rather, the idea to include the US came from contextual understanding of the European cases, and especially the high frequency of correspondence among elites across the Atlantic on the topic of electoral systems. Indeed, from their correspondence it was clear that across Europe and the settler colonies, elites saw themselves as part of a common project and readily shared strategies to advance that project. While not all CAS applications proceed in

such an inductive or exploratory manner, they are rooted in a commitment to using contextual understanding to specify the appropriate boundaries of inquiry.

Adding the US to the analysis changed both the periodization of the study and the theoretical framing. The key finding in the US case, that single-member plurality (SMP) was not the originary system as was previously assumed, led me to question whether it was the starting point for other cases (Ahmed 2010). Indeed it was not. Rather, most countries, like the US, started with mixed-member plurality and the shift to SMP, like that to proportional representation (PR), was a defensive strategy of pre-democratic parties seeking to retain power. The question then became *not* “why did some countries shift to PR and other retain SMP?” but rather, “why did countries choose to move to PR or SMP, understood as alternative strategies of competition?” This shift in the framing of the research question, though subtle, was critical and theoretically transformative. The compartmentalization of American and European Political Development in our field of study had obscured critical empirical findings and theoretical insights. Moreover, it is a demarcation that makes little sense for the nineteenth century, as the settler colonies were seen very much as an extension of Europe. Even if not

politically tied, they were intellectually and epistemically inextricable. Elites regularly exchanged ideas and political strategies to contain the incoming flow of democracy, and the settler colonies, far from being remote, ignored backwaters, were viewed as laboratories for democracy, a natural experiment unfolding for the benefit of Europe’s great powers.

Given that this particular cross-regional comparison provides so much fertile ground for investigation, it is surprising that more scholars have not made use of it. With some notable exceptions (Martin and Swank 2010; Steinmo 2010; Bateman 2018), the study of American and European political development remains fairly separate in our analysis. To be sure, there are also costs to doing CAS, especially to doing it historically, as it requires deep knowledge and a serious time commitment to developing the ethnographic sensibility necessary to do it well. But, as the CAS volume shows, there are also ways to make such comparisons manageable, through carefully constructed research designs and even creatively leveraged single case studies. While certainly not all will or should take up that call, if the paradigm of CAS encourages more scholars to look past disciplinary regional divides, we will be all the richer for it.

References

- Ahmed, Amel. 2013. *Democracy and the Politics of Electoral System Choice*. Cambridge: Cambridge University Press.
- . 2010. “Reading History Forward: The Origins of Electoral Systems in Advanced Democracies.” *Comparative Political Studies* 43, no. 8-9 (August): 1059-88.
- Ahram, Ariel I., Patrick Köllner, and Rudra Sil, eds. 2018. *Comparative Area Studies: Methodological Rationales and Cross-Regional Applications*. New York: Oxford University Press.
- Amao, Olufemi. 2018. *African Union Law: The Emergence of a Sui Generis Legal Order*. London: Routledge.
- Bateman, David. 2018. *Disenfranchising Democracy: Constructing the Electorate in the United States, the United Kingdom, and France*. Cambridge: Cambridge University Press.
- Capoccia, Giovanni and Daniel Ziblatt. 2010. “The Historic Turn in Democratization Studies” *Comparative Political Studies* 43, no.8-9 (August): 931-68.
- Capoccia, Giovanni and R. Daniel Kelemen. 2007. “The Study of Critical Junctures” *World Politics* 59, no. 3 (April): 341-69.
- Fawn, Rick. 2009. “Regions’ and Their Study: Wherefrom, What for and Whereto?” *Review of International Studies* 35, no. S1 (February): 5–34.
- Grzymala-Busse, Anna. 2011. “Time Will Tell? Temporality and the Analysis of Causal Mechanisms and Processes.” *Comparative Political Studies* 44, no. 9 (September): 1267–97.
- Holbig, Heike. 2017. “Reflecting on the Moving Target of Asia.” In *Area Studies at the Crossroads: Knowledge Production after the Mobility Turn*, edited by Katja Mielke and Anna-Katharina Hornidge, 309-26. New York: Palgrave Macmillan.
- Kreuzer, Marcus. 2010. “Historical Knowledge and Quantitative Analysis: The Case of the Origins of Proportional Representation.” *American Political Science Review* 104, no. 2 (May): 369-92.
- Mahoney, James and Dietrich Rueschemeyer, eds. 2003. *Comparative Historical Analysis in the Social Sciences*. Cambridge: Cambridge University Press.

- Martin, Cathie Jo and Duane Swank. 2010. *The Political Construction of Business Interests: Coordination, Growth, and Equality*. Cambridge: Cambridge University Press.
- Pierson, Paul. 2004. *Politics in Time: History, Institutions, and Social Analysis*. Princeton: Princeton University Press.
- . 2000. “Increasing Returns, Path Dependence, and the Study of Politics.” *American Political Science Review* 94, no. 2 (June): 251-67.
- Schaffer, Frederic. 2016. *Elucidating Social Science Concepts: An Interpretivist Guide*. New York: Routledge.
- Schatz, Edward. 2009. “Ethnographic Immersion and the Study of Politics.” In *Political Ethnography: What Immersion Contributes to the Study of Politics*, edited by Edward Schatz, 1–22. Chicago: University of Chicago Press.
- Schulten, Susan. 2001. *The Geographical Imagination in America, 1880–1950*. Chicago: University of Chicago Press.
- Simmons, Erica and Nicholas Rush Smith. 2017. “Comparison with an Ethnographic Sensibility.” *PS: Political Science and Politics* 50, no. 1 (January): 126-30.
- Skinner, Quentin. 1970. “Conventions and the Understanding of Speech Acts.” *The Philosophical Quarterly* 20, no. 79 (April): 118-38.
- Steinmo, Sven. 2010. *The Evolution of Modern States. Sweden, Japan, and the United States*. Cambridge: Cambridge University Press.
- Ugur, Mehmet. 2010. “Open-Ended Membership Prospect and Commitment Credibility: Explaining the Deadlock in EU–Turkey Accession Negotiation.” *Journal of Common Market Studies* 48, no. 4 (September): 967-91.
- Wigen, Karen and Martin Lewis. 1997. *The Myth of Continents: A Critique of Metageography*. Berkeley: University of California Press.

Synergies of CAS: New Inquires, Theory Development, and Community

Roselyn Hsueh
Temple University

The 2018 publication of Ariel Ahram, Patrick Köllner, and Rudra Sil’s edited volume *Comparative Areas Studies: Methodological Rationales & Cross-Regional Applications* (CAS) inspires enthusiasm from scholars of political science, such as myself, who are already engaged (with some trepidation in the age of mixed-methods and experimental research) in the enterprise of cross-regional contextualized comparisons. Reflecting on my own work, as well as other scholarship in the study of the political economy of development (PED), particularly comparative studies that engage the politics of China as a case, this essay considers how CAS encourages at least three synergies.

First, CAS identifies and motivates comparative investigations of regions and countries based on controlled empirical similarities and differences overlooked by traditional area studies research. Second, CAS facilitates the development of theories inspired by active engagement of theoretical and substantive advances in area studies. Third, CAS acknowledges existing scholarship and unites researchers engaged in cross-regional contextualized comparisons with

area studies scholars to create new inquiries and new communities.

New Inquiries: Nontraditional Assumptions of Similarities and Differences

The research agenda outlined in Ahram, Köllner, and Sil (2018) promotes the conduct of investigations unencumbered by traditional assumptions of similarities and differences between cases which may no longer hold (due to changing circumstances or timing, or both) or were based on outmoded stereotypes that burden rather than enlighten. Cheng Chen’s (2018) chapter, which investigates anti-corruption campaigns in China and Russia, joins other researchers engaged in work using China as a major case, crisscrossing the traditional boundaries of area studies. In traditional area studies research, on the one hand, China is often compared to its East Asian neighbors, regardless of China’s differing level of development, timing in global economic integration, and regime type, which contrast with East Asia’s newly industrialized countries (NICs).

A systematic comparison of China and the NICs that seriously considers contextual factors assumed to be similar shows profound differences which lead to different outcomes. My first book (Hsueh 2011) on China's regulatory state, which I contend is part and parcel of the country's globalization strategy, incorporates case studies of Taiwan, South Korea, and Japan. Shedding light on differences between China and the NICs, Hsueh (2011) questions traditional assumptions of similarities due to ethnocentric expectations and historical associations, and engages dominant perspectives in PED about modes of global economic integration and relationship to state control. China has historical and cultural ties to its East Asian neighbors; however, the country's post-1978 global economic integration in the context of neoliberalism and post-Cold War global politics, and Japanese colonialism and the Cold War during the NICs' similar stage of development, are important contextual factors, which profoundly shape variation in the global economic integration of China and the NICs.

On the other hand, Russia is often compared with countries in post-Soviet Eurasia. In her chapter, Chen (2018) persuasively argues for comparing the "two largest post-Communist giants" (134) in new inquiries, such as the ways in which the authoritarian party-state controls corruption, where the combination of capitalism and political authoritarianism serve as controls in the research design. Chen shows that a "well-matched and context-sensitive comparison could reveal significant divergence in the elite politics and institutional capacities of these regimes that would otherwise likely be obscured by single-case studies or studies restricted to one single geographical area" (134-135). All the same, Chen acknowledges that it may not always make sense to compare China and Russia, such as when research questions "assume scope conditions found primarily in one geographic area" (134), including studies on post-communist party systems, electoral institutions, and European integration.

Comparative Area Studies thus reconciles with Tulia Falletti and Julia Lynch's (2009) contention that "if causal mechanisms are portable but context-dependent, then to develop causal theories, we must be able to identify analytically equivalent contexts as well as specify where one context ends and another begins" (1154). By carefully delineating commonalities and similarities across cases, CAS contributes to the endeavor of generalizability in theory building. The precise combination of capitalism and post-Communist authoritarianism in China and its impacts might be overlooked by situating China

only in Asia. Likewise, understanding Japan only as an Asian country might overlook how its coordinated market economy function in patterns comparable to the advanced industrialized economies of Germany and France, as Steven K. Vogel (1996) has shown.

More nuanced comparative analysis grounded in deeper substantive understanding of regions and countries empowers the analyst to uncover the actual causal mechanisms at work. Pranab Bardhan (2010)'s comparative study of China and India shows that political institutions matter for development; however, it is not regime type per se but rather accountability institutions at different levels, which shape development outcomes. Without them, authoritarianism can distort development while severe accountability failures mar democratic governance. Likewise, the comparative studies brought together by Martin Dimitrov (2013) showcase the work of respected scholars of China and Russia, including Kellee Tsai and Thomas Remington, on understanding why in the post-1991 Soviet collapse, communism endured in five countries while it fell away in ten others. They argue and show substantively that differences in institutional adaptations shape the extent and scope of communist resilience.

Theory Development with Deep Engagement of Cases across and within Areas

"Contextualized comparisons steer a middle course between radical excisions of context-free large-n analysis and the thick, idiographic tendencies of area studies" (Ahram 2018, 156). The works in Ahram, Köllner, and Sil are in step with attempts to develop and evaluate theory armed with the willingness to engage in the deepening of knowledge of carefully selected country, intracountry, and cross-regional cases. Cross-regional contextualized comparisons offer the opportunity to "triangulate" data, just as mixed-methods research purports to do (Sil 2018). In his chapter, Sil contends that theories developed with within-case analysis (whether intra-country or intra-region) can be tested in another area, which triangulates as different types of data would. The merits of qualitative research and controlled comparisons are beyond the "close-up process-tracing analysis of a well-fitted case that usually confirms or illuminates a general proposition derived statistically or deductively" (227).

Cross-regional contextualized comparisons as advocated by CAS also synergize with the analytical leverage identified by Richard Locke and Kathleen Thelen (1996) in the comparison of similar political

developments in very different institutional contexts to understand their differences in extent and scope. Dan Slater and Daniel Ziblatt (2013) more recently underscore the indispensability of controlled case comparisons in generating internal and external validity in spite of political science's "multi-method turn" (3). Slater's 2005 study with Richard F. Doner and Bryan K. Ritchie, which challenges conventional wisdom about state autonomy in the developmental state, is developed with East Asian cases and further tested with their deep knowledge of cases from Southeast Asia.

The active engagement of scholarship across regional and country areas can inspire conceptual, theoretical, and substantive rigor, with methodological and theoretical implications (whether in triangulation of data, identification of causal mechanisms, or in the development of theory). CAS as a method of dynamic engagement of existing area studies scholarship can theoretically and substantively inform us about each individual case if findings are thoughtfully situated in existing debates and when scope conditions are clearly delineated, and claims are unambiguously defined.

In researching the country and sector cases of my next book, in addition to conducting in-depth fieldwork, I have delved into debates in area studies in ways that go beyond either accepting existing studies as never problematic or always biased and questionable. I have uncovered important divergences and similarities in how historical and primary records are understood. This discovery empowers me to tackle existing debates and new puzzles as a result of engaging them through the active triangulation of data, including pursuing primary documents and alternative secondary accounts. This is akin to what Ian Lustick (1996) describes as self-conscious use and Marc Trachtenberg (2009) refers to as the active approach toward encountering historiography as previously constructed narratives. I also avoid the "apolitical and ahistorical" reification of the market as a neutral and natural institution, as Kiren Chaudhry (1993, 246) has warned against. In this manner, CAS facilitates empirically grounded analysis and constructive extensions of and departures from prevailing knowledge without the unreasonable requirement to master deep knowledge of multiple countries from multiple regions.

Hsueh (2012) shows that in China and India's integration into the global economy, China and India have departed from neoliberalism, in addition to the diverging trajectories of the East Asian and Latin American NICs during a similar stage of development. Both countries have taken a "liberalization two-step," which

follows macro-liberalization with micro-level sectoral reregulation. Yet China and India have reregulated with political logics historically rooted in very different perceptions of strategic value and sectoral organization of institutions. In order to examine dominant patterns of market governance structures, I incorporate the same sectors in Russia into the comparative analysis (Hsueh, forthcoming), in addition to examining as shadow cases the same sectors in other countries of comparable size and timing in globalization.

Self-conscious engagement with existing debates in area studies has forced me to analytically clarify my independent and dependent variables, with the effects of specifying my research questions and carefully delineating my study's scope. It has helped me to elaborate on my controls, similarities experienced by my study's main countries (China, India, and Russia) and sectors (telecommunications and textiles). I am able to then negotiate agential and structural differences across and within the cases to refine and better articulate my theoretical framework. Showing that perceived strategic value operates across countries at the national level as well within country at the sectoral level maximizes the utility of analytical comparisons that Theda Skocpol and Margaret Somers (1980) identifies as "parallel demonstration of theory" and "the contrast of contexts" (175). It also reconciles with the CAS endeavor to identify and characterize generalizable political processes with regional and national variations.

Accumulation of Knowledge and Community Building

The CAS research agenda explicitly advocates bringing together scholars engaged in this type of scholarship, and for them to "engage with ongoing research and scholarly discourse within area studies communities" (Ahram, Köllner, and Sil 2018, 4) because "area studies can no longer be considered outmoded" (44). The community building effort is to be commended at a time when the discipline privileges certain methods and types of research, and scholars, such as myself, feel isolated in spite of a rich body of outstanding scholarship and a thriving, growing community of likeminded academics. Already I have benefited immensely from reading the works of and then meeting the excellent scholars behind the research published in the edited volume.

In addition to exposing scholars employing cross-regional contextualized comparisons, CAS recognizes the rich body of scholarship already engaged in this enterprise. Köllner, Sil, and Ahram's (2018) introduction

to the edited volume acknowledges that CAS's "use of the comparative method to surface causal linkages portable across world regions" and to engage academic "discourse in two or more area studies communities," in addition to balancing "deep sensitivity to context," (3) is not new. Indeed, in the study of PED, Atul Kohli (2004)'s systematic comparison of colonialism and the origins of patterns of state construction and intervention in South Korea, Brazil, India, and Nigeria exemplifies the best of controlled comparisons and portable causal mechanisms and regularities.

In addition to Kohli, an expert on India, China scholar Dorothy Solinger (2009) shows how representative countries from different regions (China, France, and Mexico), to alleviate crises of capital shortage in the neoliberal era, recalibrated their revolution-inspired political compacts between labor and the state to join supranational economic organizations. Mary Gallagher (2002)'s *World Politics* article compares China to Eastern Europe (Hungary) and East Asia (South Korea and Taiwan) to problematize the relationship between economic and political reforms. Yu-Shan Wu (1995)'s book, which systematically compares China, the Soviet Union, Hungary, and Taiwan, is an earlier endeavor of area studies meet generalizable inquiries. As is that of Chalmers Johnson's 1962 book, which contrasts the communist mobilizations of China and the Soviet Union.

More recent contextualized cross-regional research includes Mark W. Frazier (2019)'s comparative historical analysis on the impacts of urban land commodification

on variation in patterns of contentious politics in Shanghai and Mumbai. Frazier's work and my next book join the growing number of systematic comparisons of China to other globalizing countries of comparable circumstances and demographics, which transcend traditional boundaries of area studies.¹ These latest studies demonstrate that China can be a useful case to test and inform theories in comparative politics and comparative economic development. Whether emphasizing structural endowments, domestic and global actors and institutions, or the enduring salience of ideas, these works adopt the comparative method to examine national and subnational, micro-level variations. The cross-national analysis and subnational disaggregation enable systematic investigations that otherwise would not be possible with a focus only on macro or micro-level factors that make these countries seemingly difficult to track together.

Ahram, Köllner, and Sil's research agenda, showcased by Chen's chapter and past and present studies employing cross-regional contextualized comparisons with China as a major case in the last decade, amplifies Lily Tsai's (2017) call to China scholars "to build on previous scholarship on China while working actively with non-China colleagues to identify shared questions about political phenomena that exist beyond China" (26). Doing so extends beyond ensuring "hard-won findings about China fully contribute to knowledge" (26); it actively promotes new inquiries and new communities engaged in cross-regional and interregional contextualized comparisons.

References

- Ahram, Ariel, Patrick Köllner, and Rudra Sil, eds. 2018. *Comparative Areas Studies: Methodological Rationales and Cross-Regional Applications*. New York: Oxford University Press.
- Bardhan, Pranab K. 2010. *Awakening Giants, Feet of Clay: Assessing the Economic Rise of China and India*. Princeton: Princeton University Press.
- Bartley, Tim. 2018. *Rules without Rights: Land, Labor, and Private authority in the global economy*. New York: Oxford University Press.
- Chaudhry, Kiren. 1993. "The Myths of the Market and the Common History of Late Developers." *Politics & Society* 21, no. 3 (September): 245-274.
- Chen, Cheng. 2016. *The Return of Ideology: The Search for Regime Identities in Postcommunist Russia and China*. Ann Arbor: University of Michigan Press.
- . 2018. "Comparing Post-Communist Authoritarianism in Russia and China: The Case of Anti-Corruption Campaigns." In *Comparative Areas Studies: Methodological Rationales and Cross-Regional Applications*, edited by Ariel Ahram, Patrick Köllner, and Rudra Sil, 133-51. New York: Oxford University Press.
- Dimitrov, Martin, ed. 2013. *Why Communism Did Not Collapse: Understanding Authoritarian Regime Resilience in Asia and Europe*. Cambridge: Cambridge University Press.
- Doner, Richard, Bryan Ritchie, and Dan Slater. 2005. "Systemic Vulnerability and the Origins of Developmental States: Northeast and Southeast Asia in Comparative Perspective." *International Organization* 59, no. 2 (April): 327-61.

1 Studies include Bardhan (2010), Kennedy (2011), Dimitrov (2013), Chen (2016), Bartley (2018), Ho (2019), Hurst (2018), and Ye (2014).

- Falleti, Tulia G. and Julia F. Lynch. 2009. "Context and Causal Mechanisms in Political Analysis." *Comparative Political Studies* 42, no. 9 (September): 1143-66.
- Frazier, Mark W. 2019. *The Power of Place: Contentious Politics in Twentieth-Century Shanghai and Bombay*. Cambridge: Cambridge University Press.
- Gallagher, Mary. 2002. "Reform and Openness: Why Chinese Economic Reforms Have Delayed Democracy." *World Politics* 54, no. 3 (April): 338-72.
- Ho, Selina. 2019. *Thirsty Cities: Social Contracts and Public Goods Provision in China and India*. Cambridge: Cambridge University Press.
- Hsueh, Roselyn. 2011. *China's Regulatory State: A New Strategy for Globalization*. Ithaca: Cornell University Press.
- . 2012. "China and India in the Age of Globalization: Sectoral Variation in Post-Liberalization Reregulation," *Comparative Political Studies* 45, no. 1 (January): 32-61.
- . Forthcoming. *National Configurations of Sectoral Models of Development*. Cambridge: Cambridge University Press.
- Hurst, William. 2018. *Ruling Before the Law: The Politics of Legal Regimes in China and Indonesia*. New York: Cambridge University Press.
- Johnson, Chalmers. 1962. *Peasant Nationalism and Communist Power. The Emergence of Revolutionary China, 1937-1945*. Stanford: Stanford University Press.
- Kennedy, Scott, ed. 2011. *Beyond the Middle Kingdom: Comparative Perspectives on China's Capitalist Transformation*. Stanford: Stanford University Press.
- Kohli, Atul. 2004. *State-Directed Development: Political Power and Industrialization in the Global Periphery*. Cambridge: Cambridge University Press.
- Köllner, Patrick, Rudra Sil, and Ariel Ahram. 2018. "Comparative Area Studies: What It Is and What It Can Do." In *Comparative Areas Studies*, edited by Ariel Ahram, Patrick Köllner, and Rudra Sil, 3-28. New York: Oxford University Press.
- Locke, Richard and Kathleen Thelen. 1995. "Apples and Oranges: Contextualized Comparisons and the Study of Comparative Labor Politics." *Politics & Society* 23, no. 3 (September): 337-67.
- Lustick, Ian S. 1996. "History, Historiography, and Political Science: Multiple Historical Records and the Problem of Selection Bias." *The American Political Science Review* 90, no. 3 (September): 605-18.
- Sil, Rudra. 2018. "Triangulating Area Studies, Not Just Methods." In *Comparative Areas Studies: Methodological Rationales and Cross-Regional Applications*, edited by Ariel Ahram, Patrick Köllner, and Rudra Sil, 225-46. New York: Oxford University Press.
- Skocpol, Theda and Margaret Somers. 1980. "The Uses of Comparative History in Macrosocial History." *Comparative Studies in Society and History* 22, no. 2 (April): 174-97.
- Slater, Dan and Daniel Ziblatt. 2013. "The Enduring Indispensability of the Controlled Comparison." *Comparative Political Studies* 46, no. 10 (October): 1301-27.
- Solinger, Dorothy. 2009. *States' Gains, Labor's Losses: China, France and Mexico Choose Global Liaisons, 1980-2000*. Ithaca: Cornell University Press.
- Tsai, Lily. 2017. "Bringing in China: Insights for Building Comparative Political Theory." *Comparative Political Studies* 50, no. 3 (March): 295-328.
- Trachtenberg, Marc. 2009. *The Craft of International History: A Guide to Method*. Princeton: Princeton University Press.
- Vogel, Steven K. 1996. *Free Markets, More Rules: Regulatory Reform in Advanced Industrialized Countries*. Ithaca: Cornell University Press.
- Wu, Yu-Shan. 1995. *Comparative Economic Transformations: Mainland China, Hungary, the Soviet Union, and Taiwan*. Stanford: Stanford University Press.
- Ye, Min. 2014. *Diasporas and Foreign Direct Investment in China and India*. New York: Cambridge University Press.

Making Sense of Multipolarity: Eurasia's Former Empires, Family Resemblances, and Comparative Area Studies

Nora Fisher-Onar

University of San Francisco

As the West retrenches and new powers emerge, students of international relations are well positioned to address an outstanding question: *How to thrive in a multipolar world?* The question—and the answers which we bring to bear—resonate beyond geopolitics. This is because the task of living together in diversity is arguably the greatest analytical as well as normative challenge facing world politics more broadly (Fisher-Onar, Pearce, and Keyman 2018).

In this intervention, I address the question of living together in a multipolar world from an IR perspective. I suggest that dominant approaches like realism and liberalism, which favor Western-centric categories and large-N data, fail to capture important dynamics. I then make the case for family resemblances as a method of cross-regional comparison which enables the analyst to examine cases typically boxed into different area studies compartments. Finally, I operationalize the approach towards a baseline for comparison across Eurasia's revisionist former empires: China, Russia, Iran, and Turkey. I argue that by thus establishing a basis for comparison, we uncover patterns relevant to prospects for cooperation as well as conflict in a post-Western world.

Multipolarity: Views from the IR Tower

Attempts from within IR to make sense of multipolarity are often informed by positivist approaches like realism and liberal institutionalism.¹ Realist tools include concepts like revisionist versus status quo powers and their quest for status (Davidson 2006; Volgy et al. 2011), hegemonic stability, its eclipse and preventive war (Gilpin 1988; Levy 2011), the balance of power (Paul, Wirtz, and Fortmann 2004; Kaufman, Little, and Wohlforth 2007), and power transition (Tammen 2008). Such work offers a bird's-eye view and can help elucidate major mid-range questions like prospects for war between the retrenching United States and rising China.

Yet, there are limitations for the study of multipolarity. First, realism privileges substantive questions relevant to

great power—especially American—interests like nuclear proliferation (Kang 2003). This goes hand-in-hand with a tendency to ignore phenomena that appear pervasive to emerging powers—including nascent superpower China—like racialized hierarchies in world order.

Second, realists, like many others across the North American IR academy, tend to favor macro-quantitative methods which aggregate large numbers of randomized cases. By glossing over differences between cases, and ignoring outliers, the claim to universal purchase becomes possible (Berg-Scholsser 2018). The trade-off is that studies do not register nuance (Ahram 2013). As a result, the large-N analyst may overlook major motivational and behavioral patterns, including phenomena with causal force. A case in point is the game-changing role which counterintuitive alliances can play in and across national contexts (Fisher Onar and Evin 2010; Hart and Jones 2010).

An alternative approach is liberal institutionalism. Liberals are more likely to open the black box of domestic politics and thus to access non-Western readings of world order. However, liberals' concern is often less with non-Western perspectives than with the capacity of the Western-led liberal order and its institutions to co-opt challengers (Owen 2001; Ikenberry 2008). The primacy placed on Western concerns is evident in the intense but short-lived “hype” (Zarakol 2019) around the BRICS, which dissipated when these emerging economies wobbled by the mid-2010s (Hurrell 2019). Nevertheless, the relative share of economic and normative power enjoyed by the United States and Europe continues to diminish. As anger at relative decline finds expression in phenomena like Brexit and the Trump presidency, the capacity of the Western-led liberal order to absorb challenges under multipolarity remains in question, a concern brought into dramatic focus by the COVID-19 pandemic.

¹ For a discussion of how other, critical approaches within IR address the question, see Fisher Onar 2013; 2018.

Multipolarity: Views from—and across—Area Studies

If realist and liberal frames for reading multipolarity tell only part of the story, how to better access rising powers' perspectives? Given that the challenge is *how to thrive in a world of many poles*, the ability to triangulate across poles is valuable. Engagement of other perspectives can foster epistemological and pragmatic openings for more pluralistic research and foreign policy practices (Saylor, this issue; Acharya 2011; Fisher Onar and Nicolaidis 2013). That said, cross-regional triangulation is useful even if the analyst rejects the critical project of decentering international relations. Strategic reconnaissance of other cultures for defensive or offensive purposes is a well-established tradition. Examples include the adventures of British and Russian imperial agents in the nineteenth-century “great game” over Eurasia, and the foundation of area studies within the US academy during the Cold War to inform policy makers about non-Western regions (King 2015).

These (neo-)colonial origins notwithstanding, area studies today offers interdisciplinary insights into the cultures, economies, political systems, and foreign policies of non-Western powers. It leverages the nuanced knowledge of historians, linguists, geographers, anthropologists, sociologists, and diplomats, among others. Area studies attends, moreover, to issues of geopolitical significance from migration and social movements to political economy and the sociology of religion. In each of these arenas, field experts are likely to draw conclusions that are both more accurate and more contingent than those of counterparts in the IR tower. Such sensitivities can be useful in the management of multipolar complexity.

Yet area studies are no panacea. Respect for complexity is a normative and a methodological commitment; it can yield rich, often counter-intuitive insights, but also insistence on the *sui generis* nature of each case. This tendency is reinforced by the structural division of labor between area compartments within the academy. Thus, experts on one world region (like the Middle East) rarely converse with specialists on or from other regions (like East Asia), nor develop cross-regional expertise. The upshot is that important insights may be difficult to translate across regional specializations, much less to disciplinary IR or political science.

The challenge, then, is to mediate between problem-driven respect for case or cross-case specificity on one hand, and broader relevance on the other. Enter

Comparative Area Studies (CAS), defined by Ahram, Köllner, and Sil (2018, 3) as any “self-conscious effort” to simultaneously: (i) “balance deep sensitivity to context... us[ing] some variant of the comparative method to surface causal linkages that are portable across world regions; and, (ii) engage ongoing research and scholarly discourse in two or more area studies communities against the backdrop of more general concepts and theoretical debates within a social science discipline.”

As Sil (2018) suggests, CAS often entails cross-regional, contextualized small-N comparisons. With regard to emerging powers, this intermediate level of analysis helps to capture variance within and across actors in different regions, teasing out cross-cutting patterns. For example, the ability to recognize that a power struggle is unfolding in X state where moderates are outmaneuvering hardliners, and to compare and contrast such struggles across X, Y, and Z states affords very different insights—and policy prescriptions—than reading states as monolithic blocks (Fisher Onar 2021).

Family Resemblances and Eurasia's Former Empires: China, Russia, Iran, Turkey

There are many ways to operationalize cross-regional comparison as showcased in this symposium and the edited volume by which it was inspired. As a contribution to the toolkit, I invoke the notion of “family resemblances,” defined as cases that share significant overlapping elements even though they may not uniformly display one common feature. As Goertz (1994) suggests, family resemblances offer a handle on concepts which are “intuitively understandable,” such as electoral authoritarianism, but difficult to formulate in terms of “exact specification or definition” due to the presence of overlapping features across cases rather than identical “hard cores” (25).

The notion of family resemblances serves comparative area studies because it enables the analyst to escape the straitjacket of Cold War regional categories which tend to emphasize the role of geography over history, sociology, or economics in shaping outcomes (Pepinsky, this issue). By thus assessing resemblances across regional foci one can identify similarities and differences for fresh insights into actors that are otherwise lumped together (in large-N studies) or kept separate (in single- or area-bound small-N studies). Such patterns, in turn, can be probed towards refining the operative concept, hypothesis generation, identification of necessary and sufficient causal mechanisms, and

inductive theory-building (Goertz and Mahoney 2012).²

To demonstrate, I turn to a cross-regional, contextualized small-N set of cases which demand a medium level of expertise in return for a medium level of portability. The four cases—China, Russia, Iran, and Turkey—are geostrategic but rarely compared. Spanning the Eurasian landmass from the eastern Mediterranean to the Pacific, they have figured prominently in Western grand strategy since at least the great game between Britain and Russia. From the “Heartland” thesis of Anglo-American strategists in the early twentieth century through to Robert Kaplan’s 2018 book *The Return of Marco Polo’s World*, these states have long served as the “other” of European and American geopolitical imaginaries (Morozov and Rumelili 2012; Fettweis 2017). At the dawn of multipolarity, such anxieties are exacerbated by these countries’ revisionist behavior across the vast Eurasian geography (Mayer 2018).

However, operationalizing comparison is challenging. This is due to cross-case discrepancy when assessed via conventional IR or area studies criteria like material capacity or cultural attributes. Thus, for the IR scholar, Turkey and Iran are, at most, multi-regional middle powers with spoiler potential, while Russia is arguably a declining great power, and China a rising superpower. One can draw on the flourishing regional powers literature to address these differences (Nolte 2010; Parlar Dal 2016), but the fact remains that these four states present an “apples, oranges, and cherries” problem, as it were, regarding their comparative magnitude. Meanwhile, for the area studies analyst, historical, linguistic and sundry other specificities make comparisons between even Turkey and Iran problematic, much less with Russia and China.

Nevertheless, there is meaningful overlap, I argue, in China, Russia, Iran, and Turkey’s trajectories. The family resemblance emanates from their common experience as “revisionist former empires.” This feature matters because imperial legacies, both real and imagined, shape national projects and foreign policies (Fisher Onar 2013; 2015; 2018).

Consider that all four are: (i) successor states to large and long-lived, geographically contiguous Eurasian

empires which, (ii) since the seventeenth and eighteenth centuries, and especially during the “long nineteenth century,” were overshadowed by European colonial powers (and by a Japan reinvented along European lines). European expansion was due to military primacy and emergent forms of political and economic organization, namely, the nation-state and capitalist industrialization. But if these features helped Europeans achieve global conquest, (iii) the four Eurasian empires commanded sufficient state capacity to retain formal sovereignty. This overlapping experience distinguishes China, Russia, Iran, and Turkey from the vast majority of non-Western actors who were thoroughly subjugated.³ (iv) In response, moreover, reformists in each empire outmaneuvered traditionalists to pursue military, political, and economic modernization along Western lines for the paradoxical purpose of defense against the West.

(v) The four empires finally collapsed within roughly the same decade in the Chinese revolutions of 1911 and 1913, the Russian revolutions of 1905 and 1917, the Young Turk and Kemalist revolutions of 1908 and 1923; and the establishment of constitutional monarchy in Iran in 1925. (vi) In each case, moreover, it was internal rather than external agents that instituted modernizing authoritarian regimes. And while these regimes displayed great ideological variation as the states evolved over ensuing decades, from the foundational moment to today they have shared one common feature: deep ambivalence towards Western hegemony. (vii) Resentment of the West references the humiliating experience of eclipse,⁴ and is inculcated through school curricula, national media, and commemorative practices, among other nation-building tools. (viii) Today, anti-Western sentiments—and the promise to restore once-and-future glory—are mobilized, in turn, for domestic or foreign policy. (ix) Such agendas are distinctive from post-colonial projects, which tend to eschew expansive claims. For China, Russia, Iran, and Turkey, however, the frame is of manifest destiny regarding their ability—realistic or otherwise—to play order-setting roles in former imperial geographies. (x) Finally, overlapping resentment of the West and aspirations to power projection inform policy coordination (Kavalski 2010). This is evident in

2 Family resemblances are especially useful for analysts committed to causal inference. Soss (2018) develops the logic for interpretivist scholars, arguing that an exploratory commitment to “casing a study” rather than “studying a case” can better capture dynamics on the ground. Both approaches hold promise for problem-driven, cross-regional comparisons in a multipolar world.

3 This is a feature I elsewhere theorize in juxtaposition to the colonial and post-colonial condition as the “concessionary condition” in reference to the imposition of Capitulations regimes by European powers rather than full-fledged colonial control (Fisher Onar 2021).

4 The long-nineteenth century eclipse of these states’ *ancien regimes* by European powers is one source of what Zarakol (2010) characterizes as “stigmatization” within international society, as is the Cold War experience of domination by the United States (notably in Russia, where imperial nostalgia is arguably strongest for the Soviet rather than the Czarist period).

endeavors like the Shanghai Cooperation Organization, or the Astana group, via which Russia, Iran, and Turkey have sought to shape outcomes in Syria. Such initiatives hardly augur a unified block, but they provide discursive and institutional frameworks (Schmidt 2008) for both cooperation and rivalry, informed by an overlapping sense that the time for Western power projection across Eurasia is over.⁵

Thus, despite obvious differences, recognizing the family resemblance between China, Russia, Iran, and Turkey as “revisionist imperial successor states” enables exploration of compelling mid-range questions as the West retrenches: What commonalities and differences drive revisionist projects? How do national narratives, steeped in resentment of ebbing Western hegemony, shape policies? How, for example, do such frames intertwine with status-seeking behavior? And can they authorize action that defies rational choice expectations? If so, how do patterns at the sub- or trans-national levels compare with—and potentially mitigate—revisionism at the interstate level? What, ultimately, do our answers suggest for the propensity of Eurasia’s resurgent powers to clash or cooperate with each other, and with Western counterparts?

The toolkit of CAS can help to at least begin addressing such questions in ways that do not exclude (re-)emerging powers’ perspectives.

Conclusion

In sum, at the dawn of multipolarity, students of world politics—including but not limited to IR scholars—must make sense of non-Western diversity. To supplement an analytical apparatus forged in the West for stronger cross-regional comparisons, I have proposed a comparative area studies (CAS) framework with which to examine similarities and differences in the revisionist behavior of four major actors rarely studied in concert. Proposing “family resemblances” as a tool for comparison, I show that China, Russia, Iran and Turkey are “revisionist former empires” (Fisher Onar 2013; 2018) which can be assessed vis-a-vis their imperial pasts, and the ways such legacies shape domestic and foreign policy today. By thus establishing a baseline for comparison, individual or collaborative research can explore mid-range questions regarding cooperation and conflict between resurgent Eurasian powers, and in their relations with Western counterparts. The study of family resemblances across other traditionally-segmented area studies foci can likewise elucidate outstanding real-world problems.

References

- Acharya, Amitav. 2011. “Dialogue and Discovery: In Search of International Relations Theories Beyond the West.” *Millennium* 39, no. 3 (May): 619-37.
- Ahram, Ariel I. 2013. “Concepts and Measurement in Multimethod Research.” *Political Research Quarterly* 66, no. 2 (June): 280-91.
- Ahram, Ariel I., Patrick Köllner, and Rudra Sil, eds. 2018. *Comparative Area Studies: Methodological Rationales and Cross-Regional Applications*. New York: Oxford University Press.
- Berg-Scholsser, Dirk. 2018. “Comparative Area Studies: The Golden Mean Between Area Studies and Universalist Approaches.” In *Comparative Area Studies: Methodological Rationales and Cross-Regional Applications*, edited by Ariel I. Ahram, Patrick Köllner, and Rudra Sil, 29-44. New York: Oxford University Press.
- Davidson, Jason. 2006. *The Origins of Revisionist and Status-Quo States*. New York: Palgrave Macmillan.
- Fettweis, Christopher J. 2017. “Unipolarity, Hegemony, and the New Peace.” *Security Studies* 26 (3): 423-51.
- Fisher Onar, Nora. 2013. “Historical Legacies in Rising Powers: Toward a (Eur)Asian Approach.” *Critical Asian Studies* 45 (3): 411-30.
- . 2015. “Between Memory, History, and Historiography: Contesting Ottoman Legacies in Turkey 1923–2012.” In *Echoes of Empire: Memory, Identity, and Colonial Legacies*, edited by Nicolaidis, Kalypso, Sebe, Berny, and Gabrielle Maas. London: I.B.Tauris: 141-55.
- . 2018. “Former Empires, Rising Powers: Turkey’s Neo-Ottomanism and China’s New Silk Road.” In *Rethinking the Silk Road: China’s Belt and Road and Initiative and Emerging Eurasian Relations*, edited by Maximilian Mayer, 177-90. Singapore: Palgrave Macmillan.
- . 2021. *Pluralism in Turkey: Islam, Liberalism and Nationalism*. Cambridge: Cambridge University Press.

⁵ An interesting question beyond the scope of the present essay but bearing further exploration regards how many resemblances must be present to constitute a legitimate basis for comparison. Soss’s (2018) work on how to reflexively “case studies” as the analyst interpolates between empirics, theories, and research question rather than “studying cases” as pre-existing phenomena may offer some answers.

- Fisher Onar, Nora, and Ahmet Evin. 2010. "Convergence and Resistance: The European Dilemma of Turkish Intellectuals." In *European Stories: Intellectual Debates on Europe in National Contexts*, edited by Justine Lacroix and Kalypso Nicolaidis, 294-314. Oxford: Oxford University Press.
- Fisher Onar, Nora and Kalypso Nicolaidis. 2013. "The Decentering Agenda: Europe as a Post-Colonial Power." *Cooperation and Conflict* 48, no. 2 (June): 283-303.
- Fisher-Onar, Nora, Susan C. Pearce, and E. Fuat Keyman, eds. 2018. *Istanbul: Living with Difference in a Global City*. New Brunswick: Rutgers University Press.
- Gilpin, Robert. 1988. "The Theory of Hegemonic War." *The Journal of Interdisciplinary History* 18, no. 4 (Spring):591-613.
- Goertz, Gary. 1994. *Contexts of International Politics*. Cambridge: Cambridge University Press.
- Goertz, Gary, and James Mahoney. 2012. *A Tale of Two Cultures: Qualitative and Quantitative Research in the Social Sciences*. Princeton: Princeton University Press.
- Hart, Andrew F., and Bruce D. Jones. 2010. "How do Rising Powers Rise?" *Survival* 52 (6): 63-88.
- Hurrell, Andrew. 2018. "Beyond the BRICS: Power, Pluralism, and the Future of Global Order." *Ethics and International Affairs* 32, no. 1 (Spring): 89-101.
- Ikenberry, G. John. 2008. "The Rise of China and the Future of the West: Can the Liberal System Survive?" *Foreign Affairs* 87, no. 1 (January-February):23-37.
- Kang, David C. 2003. "Getting Asia Wrong: The Need for New Analytical Frameworks." *International Security* 27, no. 4 (Spring): 57-85.
- Kaplan, Robert D. 2018. *The Return of Marco Polo's World: War, Strategy and American Interests in the Twenty-First Century*. New York: Random House.
- Kaufman, Stuart J., Richard Little, and William C. Wohlforth, eds. 2007. *The Balance of Power in World History*. New York: Palgrave Macmillan.
- Kavalski, Emilian. 2010. "Shanghaied into Cooperation: Framing China's Socialization of Central Asia." *Journal of Asian and African Studies* 45, no. 2 (April): 131-45.
- King, Charles. 2015. "The Decline of International Studies: Why Flying Blind is Dangerous." *Foreign Affairs*, July/August, 2015. <https://www.foreignaffairs.com/articles/united-states/decline-international-studies>
- Levy, Jack S. 2011. "Preventive War: Concept and Propositions." *International Interactions* 37 (1): 87-96.
- Mayer, Maximilian. 2018. "China's Historical Statecraft and the Return of History." *International Affairs* 94, no. 6 (November): 1217-35.
- Morozov, Viatcheslav, and Bahar Rumelili. 2012. "The External Constitution of European Identity: Russia and Turkey as Europe-makers." *Cooperation and Conflict* 47, no. 1 (March): 28-48.
- Nolte, Detlef. 2010. "How to Compare Regional Powers: Analytical Concepts and Research Topics." *Review of International Studies* 36, no. 4 (October): 881-901.
- Owen, John M. 2001. "Transnational Liberalism and US Primacy." *International Security* 26, no. 3 (Winter 2001/02): 117-52.
- Parlar Dal, Emel. 2016. "Conceptualising and Testing the 'Emerging Regional Power' of Turkey in the Shifting International Order." *Third World Quarterly* 37 (8): 1425-53.
- Paul, T.V., James J. Wirtz, and Michel Fortmann, eds. 2004. *Balance of Power: Theory and Practice in the 21st Century*. Stanford: Stanford University Press.
- Schmidt, Vivian A. 2008. "Discursive Institutionalism: The Explanatory Power of Ideas and Discourse." *Annual Review of Political Science* 11, no. 1 (June): 303-26.
- Sil, Rudra. 2018. Triangulating Area Studies, Not Just Methods: How Cross-Regional Comparison Aids Qualitative and Mixed-Method Research." In *Comparative Area Studies: Methodological Rationales and Cross-Regional Applications*, edited by Ariel I. Ahram, Patrick Köllner, and Rudra Sil, 225-246. New York: Oxford University Press.
- Soss, Joe. 2018. "On Casing a Study Versus Studying a Case." *Qualitative and Multi-Method Research* 16, no. 1 (Spring): 21-7.
- Tammen, Ron. 2008. "The Organski Legacy: A Fifty-Year Research Program." *International Interactions* 34 (4): 314-32.
- Volgy, Thomas J., Renato Corbetta, Keith A. Grant, and Ryan G. Baird, eds. 2011. *Major Powers and the Quest for Status in International Politics: Global and Regional Perspectives*. New York: Palgrave Macmillan.
- Zarakol, Ayse. 2010. *After Defeat: How the East Learned to Live with the West*. Cambridge: Cambridge University Press.
- . 2019. "'Rise of the Rest': As Hype and Reality." *International Relations* 33, no. 2 (June): 213-28.

The Sweet Spot in Comparative Area Studies: Embracing Causal Complexity through the Identification of Both Systematic and Unsystematic Variables and Mechanisms

Marissa Brookes

University of California, Riverside

The tremendous value of Comparative Area Studies (CAS) is difficult to overstate, as CAS scholars appear to accomplish the impossible: reaching broad-ranging conclusions from cross-case comparisons spanning two or more geographic regions, while still incorporating the sort of deep and detailed knowledge of people and places that is the hallmark of classic area studies. CAS researchers not only showcase the approach's great strengths; they also encourage more work along these lines, since CAS contributions comprise only around 15 percent of recent works in comparative politics (Ahram, Köllner, and Sil 2018, 17). With this encouragement comes some welcome advice, including a push for more precisely conceptualized variables so that they are portable across contexts, admonitions against the assumption that geographic proximity defines the full population of cases to which one's theory applies, and a reminder that idiosyncratic factors are no less important than systematic conditions when it comes to causal explanation.

This essay offers additional advice to enhance the CAS approach, starting from the premise that Comparative Area Studies' greatest strength is also its main challenge: striking a balance between fully context-sensitive case studies, and the development of generalizable causal theories. I argue that CAS scholars can better balance these idiographic and nomothetic goals through more careful consideration of the logic of causal inference guiding one's research. In particular, CAS scholarship would benefit not only from more explicit attention to whether explanatory variables found to travel across regions are necessary, sufficient, INUS, or SUIN, but also from a more conscious effort to determine whether or not the causal mechanisms linking explanatory variables to outcomes also travel across regions. In other words, does X_1 cause Y_1 *in the same way* in one region or area as it does in another?

Good qualitative hypothesis testing typically entails two things: establishing the causal importance of

variables that cases have in common through cross-case analysis and identifying the mechanisms that link those variables to the outcome of interest through within-case process tracing. For the first task, CAS scholars seek to test whether a causal theory that explains cases in one region or area also explains cases in regions or areas other than the one in which that theory was initially developed. Yet it is not always clear what it means for a theory to "travel" across areas. For instance, if X_1 , X_2 , and X_3 are found to cause Y_1 in cases in Southeast Asia, should CAS researchers reject the cross-regional generalizability of the causal theory if they find that X_1 and X_2 , but not X_3 , are causally significant for Y_1 in cases in Latin America? Part of the problem is that assessing a theory's generalizability is not as simple as determining whether X_1 , X_2 , or X_3 is present or absent across all cases with the outcome Y_1 . Here is where more careful attention to the nature of explanatory variables in relation to each other and to the outcome can help.

In particular, CAS scholars should first specify whether the explanatory variables under consideration are necessary, sufficient, INUS (an insufficient but necessary part of a larger cause that is itself sufficient but unnecessary), or SUIN (a sufficient but unnecessary part of a larger cause that is itself insufficient but necessary) (Mahoney, Koivu, and Kimball 2009). Doing so would allow the researcher to then consider whether his or her causal theory is cross-regionally generalizable—meaning applicable to cases in more than one world region—despite cases examined in the second region not having the exact same combination of explanatory variables as the cases examined in the first region. For instance, in the example above, failing to find X_3 in any of the Latin American cases would not render the causal theory inapplicable to Latin America if X_3 is only a sufficient, but not necessary, cause of Y_1 in the Southeast Asian cases. Likewise, consider the possibility of X_3 being an INUS variable, as in the following causal equation:

Figure 1. $(X_1 * X_2) + (X_3 * X_4) \rightarrow Y_1^1$

Again, finding X_1 , X_2 , and X_3 in the Southeast Asian cases, but only X_1 and X_2 in the Latin American cases, would still confirm that one's theory travels across regions since X_3 is part of a causal combination that is not necessary to produce the outcome Y_1 . Finally, consider what would happen if X_3 were a SUIN variable, as in each of the following possibilities:

Figure 2. $(X_1 + X_2) * (X_3 + X_4) \rightarrow Y_1$

Figure 3. $X_1 * (X_2 + X_3) \rightarrow Y_1$

Figure 4. $X_2 * (X_1 + X_3) \rightarrow Y_1$

Figure 5. $X_1 * X_2 * (X_3 + X_4) \rightarrow Y_1$

Once more, finding that X_1 , X_2 , and X_3 cause Y_1 in the Southeast Asian cases, while only X_1 and X_2 cause Y_1 in the Latin American cases, would not necessarily render one's causal theory ungeneralizable across regions, unless one of the Latin American cases were missing not only X_3 but also X_4 in the scenario represented in either Figure 2 or Figure 5.

Note that X_3 —whether sufficient, INUS, or SUIN—can still be considered a systematic variable, even if it does not appear in any of the Latin American cases, because X_3 is still part of a larger causal model that explains cases in both regions. It is important to keep in mind, however, that a complete causal explanation for any one case often also includes unsystematic variables, meaning factors that are truly unique to a single case, which CAS scholars are right to recognize as no less important for causal explanation than systematic variables, which contribute to causal explanation in at least two cases. Cross-case analyses help scholars separate systematic from unsystematic variables so we can identify the generalizable parts of the causal story *even if* the full causal explanation for any one case also includes idiosyncratic factors that cannot be generalized beyond a single case.

That said, it is possible that what appears at first to be an unsystematic variable in the initial analysis of cases in one region is later revealed to be a systematic variable once additional cases are analyzed in a different region. For instance, X_1 , X_2 , and X_3 might be found to cause Y_1 in every Southeast Asian case except one, which instead features X_1 , X_2 , and X_4 . At first, X_4 would appear to be

idiosyncratic to that single Southeast Asian case. Adding Latin American cases to the analysis, however, could reveal that most Y_1 cases in Latin America are also caused by X_1 , X_2 , and X_4 , meaning X_4 is a systematic variable after all. Such a scenario would suggest the causal model represented in Figure 5.

In sum, the first way for CAS scholars to test whether their causal theories travel across regions is through cross-case analysis. Crucially, testing for the generalizability of a causal theory is not the same thing as expecting every positive (Y_1) case within one's scope conditions to feature the exact same combination of explanatory variables as every other Y_1 case. Rather, what matters is whether each explanatory variable is necessary, sufficient, INUS, or SUIN since the role each variable plays in the full causal model tells the researcher how to interpret that variable's presence or absence in each case. Only fully necessary variables should be expected to appear in every Y_1 case.

The second way for CAS scholars to test whether a causal theory is generalizable beyond a single geographic region is through a cross-regional analysis of causal mechanisms. Qualitative researchers rarely rely on cross-case analyses alone to test their causal hypotheses. Instead, they combine cross-case methods with process tracing, a within-case method of causal inference that provides evidence of the specific processes through which explanatory variables actually cause the outcome in question. Arguably, causal mechanisms are at the core of theory development, which requires the researcher not only to identify a non-spurious correlation between explanatory variables (X_1 , etc.) and the dependent variable (Y_1) but also to explicate *how* and *why* those explanatory variables actually cause the dependent variable. Therefore, if scholars strive to develop truly generalizable causal theories, they should test not only whether the variables in their causal models travel across regions but also whether, holding variables constant, the same causal *mechanisms* connect those explanatory variables to outcomes in different cases. This advice applies to qualitative comparisons in general, but should prove especially valuable for CAS scholarship, which can evaluate the generalizability of causal theories by searching for recurring causal mechanisms across cases in different regions.

The distinction between variables and mechanisms is an important one. If a researcher finds that X_1 and X_2 are causally significant for Y_1 in all cases examined across both Southeast Asia and Latin America, it is still

1 Following the norms of Boolean algebra, the + denotes the logical OR, and the * denotes the logical AND.

possible that the specific processes through which X_1 and X_2 cause Y_1 actually differ across the two regions. That is, X_1 and X_2 might cause Y_1 through one mechanism in Southeast Asia, and through an entirely different mechanism in Latin America. Such equifinality in causal mechanisms, again, holding variables constant, would call into question the cross-regional generalizability of the causal theory. Yet this is exactly where CAS scholars' deep area knowledge can bring balance to the analysis. By conducting fully context-sensitive case studies that "get the story right" as best as possible for each case through consideration of case-specific background details and vital idiosyncrasies, CAS scholars are well positioned to assess whether equifinality in causal mechanisms is

caused by something systematic within or across regions or by factors that are unique to individual cases.

Political scientists will increasingly view Comparative Area Studies not just as a welcome addition to the qualitative methods toolkit, but as outright indispensable for moving comparative politics and related subfields forward. The two main goals of CAS scholarship— theoretical breadth and case-specific depth—are not at odds and actually enhance each other in several ways. Getting the most out of CAS, however, will require greater consideration of the specific causal role each explanatory variable plays within a causal theory as well as closer attention to whether or not causal mechanisms, not just variables, travel across regions.

References

- Ahram, Ariel I., Patrick Köllner, and Rudra Sil, eds. 2018. *Comparative Area Studies: Methodological Rationales and Cross-Regional Applications*. New York: Oxford University Press.
- Mahoney, James, Erin Kimball, and Kendra L. Koivu. 2009. "The Logic of Historical Explanation in the Social Sciences." *Comparative Political Studies* 42, no. 1 (January): 114–46.

What's the "Area" in Comparative Area Studies?

Thomas Pepinsky
Cornell University

Comparative Area Studies (CAS) promises to bring together the method of focused qualitative comparison and a sensitivity to area context in multiple world regions. Ariel Ahram, Patrick Köllner, and Rudra Sil's *Comparative Area Studies* (2018), for example, provides a wonderful overview of how comparativists can learn from what might seem to be audacious cross-regional comparative projects. What could be more interesting than insisting that we read more European political history to make better sense of the case of the United States (Ahmed 2018) or identifying the "Arab" Spring in Israel and Mali (Ahram 2018)? I suspect that for many comparative social scientists, the very idea of learning about something familiar by comparing it with something very different is what attracted us to our field in the first place.

And yet the broader enterprise of CAS rests on what I consider to be a profoundly conservative orientation towards the world's regions. The starting point for this short essay is the observation that the literature on CAS almost universally conceptualizes "areas" or "world regions" in traditional Cold War terms (see e.g., Ahram, Köllner, and Sil 2018; Basedau and

Köllner 2007). Although areas such as "Latin America" and "the former Soviet Union and Eastern Europe" do reflect geographical features and some world-historical processes, as categories they primarily reflect Western, and in particular American Cold War, *political* categories. An alternative model for CAS would be to reject these traditional conceptualizations of area and embrace more historically grounded or socially meaningful understandings of the world: former Spanish colonies, former Ottoman territories, Zomia, the Indian Ocean and Mediterranean worlds, communist single-party states, and others. Some comparative area specialists have suggested how to do this; for example, Cheng Chen (2018) remarks that the post-communist world encompasses both the former Soviet Union and parts of Asia and Latin America. One future for CAS is to reconfigure "areas" and "regions" around these alternative ways of organizing cross-regional comparisons, thereby joining critics of "area studies" as commonly understood from across the humanities and social sciences.

The remainder of this essay develops this argument. In the next section I use the discussions in Ahram, Köllner, and Sil (2018) to identify what I consider to be

a relatively thin substantive understanding of regions or areas, and their contribution to the enterprise of CAS. I then turn to the case of Southeast Asia—a particularly diverse and rather problematic world region—to illustrate the limits of regional knowledge and the necessity of cross-regional comparisons for most useful comparative social science. Based on these examples, I then conclude by discussing a future for CAS that rejects traditional definitions of world regions in service of a more substantive understanding of how nation-states might be classified or categorized.

Area Knowledge in Comparative Area Studies

Area studies insights and regional expertise have always shaped the development of comparative politics; periodic worries about the demise of area studies notwithstanding, this is unlikely to change. Writing about the third wave of democratization twenty years ago, Valerie Bunce (2000, 716) explained both the pragmatic and substantive reasons why research has been organized by world regions:

Intellectual capital, the temporally clustered character of these regional transitions, and the undeniable appeal of carrying out controlled, multiple case comparisons are all compelling and convenient reasons to compare Latin American countries with each other, post-Socialist countries with each other, and the like.

CAS looks beyond what Bunce called the “bounded generalizations” that come from within one region in search of the possibilities of (and limits to) further generalization—while remaining faithful to the insights that only area knowledge can provide.

In addition to seeing whether findings generalize, cross-area comparisons are particularly valuable for demonstrating whether *concepts* developed within one region travel or not. The chapter by Von Soest and Stroh (2018), for example, discusses *neopatrimonialism* in sub-Saharan Africa, and the roughly comparable concepts of *bossism* from Southeast Asia and *caudillismo* from Latin America. If neopatrimonialism only makes sense in its application to sub-Saharan Africa, then the concept is useful, but narrow; if it is roughly synonymous with bossism and caudillismo, then all three might be replaced with a more general concept that encompasses them all. Comparing only across regions while maintaining careful attention to the intention of each concept—which depends on the area studies context in which the concept emerged—makes this possible.

Examples such as this, unfortunately, are rare among scholars working explicitly in the CAS tradition. Most invocations of CAS focus on what can be learned by comparing what might seem to be very different cases, and Mill-style defenses of the utility of comparing in this way. Actual *conceptual* insights drawn from comparing across areas are almost entirely absent.

It could be that as CAS continues to mature as an intellectual agenda, it will focus more on concepts and findings that have emerged from rich area studies debates, and that productively travel across regions. But what if such conceptual contributions are rare because “areas” are not analytically meaningful? Quoting Bunce (2000) further,

At the most general level, region is a summary term for spatially distinctive but generalizable historical experiences that shape economic structures and development and the character and continuity of political, social, and cultural institutions... Region, therefore, lacks the specificity we value as social scientists. Among other things, it tends to be too variable in what it means—over time and across research endeavors. It is also easily misunderstood and all too often underspecified. (722-3)

In this view, comparative social scientists ought to be skeptical of world regions as conceptual categories. It is the “historical experiences” and “institutions” that are of real interest, and our attention should be focused on these rather than on the geographic “summary term” used to classify particular countries.

I do not wish to make too much of this critique. Plainly, sub-Saharan Africa just *is* different than East Asia. But for the “area” in CAS to be meaningful, it must do real analytical work. I see little evidence that the areas or world regions in CAS are doing anything more than representing a handy shorthand for “this country is different and far away from this other country.”

What’s in an Area?

My view is that areas are doing little analytical work in CAS because world regions rarely do much analytical work even under the best circumstances. To see why, I will invoke the case of Southeast Asia. Of all world regions or areas, it is perhaps the most obviously a social construction. It is not united by language, colonial history, climate, biogeography, race, religion, or anything else. Southeast Asia is nothing more than the stuff between South Asia, East Asia, Australia, and the Pacific.

Few Southeast Asianists really take the region seriously as a world region or area with an inherent or objective internal logic.¹ “Southeast Asia” exists because of what I have elsewhere termed the “historical accident” (Pepinsky 2015) of World War II, and it persists because of the convenience of perpetuating the academic division of labor. This is not to dismiss Southeast Asian studies as a field of study, but rather simply to note, as Ashley Thompson (2012) writes, that “the existential question—[what] is Southeast Asia?²—has been constitutive of and essentially coterminous with the field of Southeast Asian Studies” (3).

A Southeast Asianist like me² will approach the very premise of CAS with some inherent skepticism. Sure, we should compare across areas or world regions, using the insights from other regions to enrich what we know about our own while endeavoring to remain sensitive to the regional or national context of each case. But that is what most Southeast Asianists already do, because we have to. Communist single-party regimes are rare, so comparing Vietnam with another case requires looking outside of the region, to East Asia (Malesky, Abrami, and Zheng 2011). Cases of regime collapse in Muslim-majority authoritarian regimes are also rare, so comparing the fall of Indonesia’s New Order to another case of Muslim-majority regime change requires looking to the Middle East (Pepinsky 2014). My understanding of CAS in Southeast Asia differs rather starkly from Huotari and Rüländ (2018), who focus on concepts such as Anderson’s (1983) “imagined communities” or Slater’s (2012) “strong state democratization” that might usefully travel to other world regions. In my view, Southeast Asia as a *region* has not done much analytical work in these or any other contributions. *Country* knowledge is essential; *regional* knowledge is not. Generalizing beyond the countries that inspired them is not Comparative Area Studies, it is just regular Comparative Politics. The same is equivalently true for many old and new classics in comparative politics that compare cases across world regions: Theda Skocpol (1979) on social revolutions in France, Russia, and China; Anthony Marx (1998) on race in South Africa, Brazil, and the United States; and Susan Stokes et al. (2013) on brokers in Argentina, India, and Venezuela.

And outside of the more positivist social sciences, the notion that one would look beyond the traditional

world region is part and parcel of what most people who study the countries that comprise Southeast Asia actually do. Themes of movement, border-crossing, and reconfiguration of Western conceptual categories to reflect more socially meaningful geographies can be found across the humanities and interpretive social sciences. Such research is not really CAS in the sense that authorities in the methodology such as Ahrām, Köllner, and Sil (2018) mean it, because it is not really about comparing units. But it does mean that the study of Theravada Buddhism in Thailand requires some understanding of a “southern Asian Buddhist world characterized by a long and continuous history of integration across the Bay of Bengal region” (Blackburn 2015), and that studying Southeast Asian *hajjis* means studying the Indian Ocean networks that they follow (Tagliacozzo 2013). And in fact, one of the most influential conclusions from the past twenty years of Southeast Asian studies is that vertical geography is often more consequential than spatial geography. The highland area termed “Zomia” (van Schendel 2002) that spans East, South, and mainland Southeast Asia comprises a more socially meaningful “region” for most of history than does the WWII-era concept of “Southeast Asia.”

“Areas” as Substantive Themes

One response from a defender of CAS might be to hold that Southeast Asia is a misfit area, not representative of the other areas. Perhaps this is true. But I wish to offer a more constructive response, in which the Southeast Asian experience generalizes. One future for CAS would be to redefine “areas” or “regions” as traditionally understood. Rather than reifying world regions as substantive entities or even as analytical categories, CAS might reconfigure world regions or areas along substantive themes: colonial, religious, linguistic, geographic, or political. In what follows I offer examples of each, drawing from prominent themes in Southeast Asian politics.

That different colonial regimes endowed postcolonial societies with different social and institutional legacies is an old theme in the social sciences. Rather than imagining Southeast Asia as a region, one might instead look at the former British or Spanish empires as providing the natural regions within which to compare what are otherwise very different countries like Myanmar and the Philippines.

1 It is interesting to note that international relations theorists take the region-ness of Southeast Asia much more seriously than comparativists or area specialists, whose job it is to know the politics of the countries in it (see e.g., Acharya 2013).

2 I recognize that there is an irony in identifying as a Southeast Asianist but then criticizing the usefulness of this concept of Southeast Asia. In my own case—which is common among regional experts—I became a “Southeast Asianist” only upon applying for academic jobs and being expected to teach courses on Southeast Asia.

This might suggest comparing direct and indirect rule in British India and British Malaya, or “cacique democracy” in the Philippines (Anderson 1988) with its counterparts in Latin America. These comparisons are only surprising “inter-regional” comparisons relative to a narrowly geographical understanding of regions.

World religions also provide a substantively meaningful way to conceptualize world regions. The Muslim world and the Theravada Buddhist world, as noted above, both would group some Southeast Asian countries with other countries from South Asia (the Theravada Buddhist world) and further afield (the Muslim world). Catholic majority countries would lump the Philippines with southern and central Europe and Latin America; Vietnam and Singapore would join China, Japan, and Korea in their combination of Mahayana Buddhism with Confucian principles. For questions of identity, religious mobilization, or state-religious authority relations, these might prove to be much more useful conceptual categories than would any geographic area.

Southeast Asia’s linguistic diversity is particularly striking. Also striking is how *some* countries find themselves part of a broader community defined by colonial language. Timor-Leste, a former Portuguese colony occupied for a quarter century by Indonesia, immediately joined the Lusosphere upon independence in 2002. Although this group of countries also shares a history of Portuguese colonialism, so colonial and linguistic heritage overlap perfectly, the phenomenon of a European language spoken primarily by a *mestiço* elite serving as a tool to build national identity in plural societies travels well across the Lusosphere (and travels poorly elsewhere in Southeast Asia).

Geography does serve as a convenient tool for classifying world regions, and “horizontal” or “flat map” geography does capture important spatial variation around the world. But as discussed above in the discussion of Zomia, “vertical” geography provides an alternative conception of space that can unite upland peoples across world regions—and, as a result, lowland peoples as well. Other geographies might focus on water rather than land as the unifying characteristic: the Indian Ocean world,

for example, or the littoral states of East and Southeast Asia around the East Vietnam/West Philippine/South China Sea.

The final substantive theme through which to reconfigure world regions is political. The postcommunist world includes Vietnam and Laos alongside the former Soviet Union, China, Cuba, and so forth. Petroleum-rich hereditary sultanates include Brunei Darussalam alongside the United Arab Emirates and Qatar. Other regime types unite the competitive authoritarian regimes of Singapore and (formerly) Malaysia with counterparts in Tanzania and (formerly) Mexico, and the junta in Thailand under Prayut Chan-o-cha with Egypt under Abdel Fattah el-Sisi (Geddes, Wright, and Frantz 2014).

Each of these examples follows a common logic: rather than seeing whether concepts or findings travel from one regional context to another, they start with the assumption of comparability based on a substantively or theoretically relevant characteristic and use this to define the scope conditions of a particular analytical or empirical claim. There are naturally risks to this exercise, as the assumption that communism or colonial heritage forms a natural comparison set itself warrants further investigation. And insofar as world regions serve as the primary organizational units for comparative politics more broadly, this argument also implies that the broader interdisciplinary practice of conceptualizing the world into regions warrants further scrutiny.³ But refiguring “areas” around substantive rather than geographic variables may prove to be a useful way to develop the logic of CAS further, with implications that travel to comparative politics as a discipline more broadly.

The argument I make here is not to imply that CAS ought to discard “Latin America” or “the Middle East and North Africa”⁴ as categories. Rather, CAS researchers ought to strive to “replac[e] proper names of social systems by the relevant variables” (Przeworski and Teune 1970, 30); here, this means focusing less on regions and more on the substantive features that a collection of countries shares. If this is not possible—and I believe that it sometimes is not (Pepinsky 2017)—then we need substantive engagement with regions *qua* regions.

References

- Acharya, Amitav. 2013. *The Making of Southeast Asia: International Relations of a Region*. Ithaca: Cornell University Press.
- Ahmed, Amel. 2018. “American Political Development in the Mirror of Europe: Democracy Expansion and the Evolution of Electoral Systems in the 19th Century.” In *Comparative Area Studies: Methodological Rationales and Cross-Regional Approaches*,

³ And indeed, one interpretation of the “area studies wars” of the 1990s was an argument that regional knowledge was subservient to comparative social science (see e.g., Bates 1996).

⁴ Or “Southeast Asia,” I dutifully insist.

- edited by Ariel I. Ahram, Patrick Köllner and Rudra Sil, 103-118. New York: Oxford University Press.
- Ahram, Ariel I. 2018. "Comparative Area Studies and the Analytical Challenge of Diffusion: Explaining Outcomes in the Arab Spring and Beyond." edited by Ariel I. Ahram, Patrick Köllner and Rudra Sil, 152-167. New York: Oxford University Press.
- Ahram, Ariel I., Patrick Köllner, and Rudra Sil, eds. 2018. *Comparative Area Studies: Methodological Rationales and Cross-Regional Applications*. New York: Oxford University Press.
- Anderson, Benedict. 1983. *Imagined Communities: Reflections on the Origin and Spread of Nationalism*. London: Verso.
- . 1988. "Cacique Democracy in the Philippines: Origins and Dreams." *New Left Review* 169 (May/June): 3-31.
- Basedau, Matthias, and Patrick Köllner. 2007. "Area studies, comparative area studies, and the study of politics: Context, substance, and methodological challenges." *Zeitschrift für Vergleichende Politikwissenschaft* 1, no. 1 (October): 105-24.
- Bates, Robert H. 1996. "Letter from the President: Area Studies and the Discipline." *APSA-CP: Newsletter of the APSA Organized Section in Comparative Politics* 7, no. 1 (Winter): 1-2.
- Blackburn, Anne M. 2015. "Buddhist Connections in the Indian Ocean: Changes in Monastic Mobility, 1000-1500." *Journal of the Economic and Social History of the Orient* 58, no. 3 (July): 287-66.
- Bunce, Valerie. 2000. "Comparative Democratization: Big and Bounded Generalizations." *Comparative Political Studies* 33, no. 6-7 (September): 703-34.
- Chen, Cheng. 2018. "Comparing Post-communist Authoritarianism in Russia and China: The Case of Anti-corruption Campaigns." In *Comparative Area Studies: Methodological Approaches and Cross-Regional Applications*, edited by Ariel I. Ahram, Patrick Köllner and Rudra Sil, 133-151. New York: Oxford University Press.
- Geddes, Barbara, Joseph Wright, and Erica Frantz. 2014. "Autocratic Breakdown and Regime Transitions: A New Data Set." *Perspectives on Politics* 12, no. 2 (June): 313-31.
- Huotari, Mikko, and Jürgen Rüländ. 2018. "Context, Concepts, and Comparison in Southeast Asian Studies." In *Comparative Area Studies: Methodological Approaches and Cross-Regional Applications*, edited by Ariel I. Ahram, Patrick Köllner and Rudra Sil, 85-102. New York: Oxford University Press.
- Malesky, Edmund J., Regina M. Abrami, and Yu Zheng. 2011. "Institutions and Inequality in Single-Party Regimes: A Comparative Analysis of Vietnam and China." *Comparative Politics* 43, no. 4 (July): 409-27.
- Marx, Anthony W. 1998. *Making Race and Nation: A Comparison of South Africa, the United States, and Brazil*. New York: Cambridge University Press.
- Pepinsky, Thomas B. 2014. "Political Islam and the Limits of the Indonesian Model." *Taiwan Journal of Democracy* 10, no. 1 (July): 105-21.
- . 2015. "Disciplining Southeast Asian Studies." *Sojourn: Journal of Social Issues in Southeast Asia* 30, no. 1 (March): 215-26.
- . 2017. "Regions of Exception." *Perspectives on Politics* 15, no. 4 (December): 1034-52.
- Przeworski, Adam, and Henry Teune. 1970. *The Logic of Comparative Social Inquiry*. New York: John Wiley.
- Skocpol, Theda. 1979. *States and Social Revolutions: A Comparative Analysis of France, Russia, and China*. New York: Cambridge University Press.
- Slater, Dan. 2012. "Strong-state Democratization in Malaysia and Singapore." *Journal of Democracy* 23, no. 2 (April): 19-33.
- Stokes, Susan C., Thad Dunning, Marcelo Nazareno, and Valeria Brusco. 2013. *Brokers, Voters, and Clientelism: The Puzzle of Distributive Politics*. New York: Cambridge University Press.
- Tagliacozzo, Eric. 2013. *The Longest Journey: Southeast Asians and the Pilgrimage to Mecca*. New York: Oxford University Press.
- Thompson, Ashley. 2012. "Review of Sheldon Pollock, *The Language of the Gods in the World of Men: Sanskrit, Culture, and Power in Premodern India*." *Bryn Mawr Review of Comparative Literature* 10, no. 1 (Fall). <https://repository.brynmawr.edu/bmrc/vol10/iss1/1>
- van Schendel, Willem. 2002. "Geographies of Knowing, Geographies of Ignorance: Jumping Scale in Southeast Asia." *Environment and Planning D: Society and Space* 20, no. 6 (December): 647-668.
- von Soest, Christian, and Alexander Stroh. 2018. "Comparisons across World Regions: Managing Conceptual, Methodological, and Practical Challenges." In *Comparative Area Studies: Methodological Approaches and Cross-Regional Applications*, edited by Ariel I. Ahram, Patrick Köllner and Rudra Sil, 66-84. New York: Oxford University Press.