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Triangulating Area Studies, Not Just Methods:
How Cross-Regional Comparison Aids Qualitative and Mixed-Method Research

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Abstract

This chapter revisits trade-offs that qualitative researchers face when balancing the different expectations of area studies and disciplinary audiences. One putative solution to such trade-offs, mixed-method research, emphasizes the triangulation of quantitative and qualitative methods. CAS, as defined above, essentially encourages a different form of triangulation – the pooling of observations and interpretations across a wider array of cases spanning multiple areas. This kind of triangulation can be facilitated by cross-regional contextualized comparison, a middle range approach that stands between area-bound qualitative research and (Millean) macro-comparative analysis that brackets out context in search of causal laws. Importantly, this approach relies upon an area specialist's sensibilities and experience to generate awareness of local complexities and context conditions for less familiar cases. The examples of cross-regional contextualized comparison considered in this chapter collectively demonstrate that engagement with area studies scholarship and the pursuit of disciplinary knowledge can be a positive-sum game.

> *"Recent decades have witnessed a dramatic reemergence of the comparative historical tradition.... this mode of investigation has reasserted itself at the center of today's social sciences."* -- James Mahoney and Dietrich Rueschemeyer (2003, 3)

> *"Systematic cross-regional comparison is neither widely practiced nor written about from a methodological point of view, in contrast to case studies, small-N comparative historical studies within the same region ... and large-N quantitative studies."* -- Evelyne Huber (2003, 1)

Introduction: On Trade-offs and Triangulation

On the surface, the above statements, both made in 2003, seem to contradict one another. A closer look, however, suggests they are actually congruous. Of the fifty or so books Mahoney and Rueschemeyer (2003, 3-4, nn.1-8) cite as examples of "comparative-historical research," the

overwhelming majority of examples are studies of a single country or area; only a small handful compare cases from two or more world regions (e.g. Evans 1995; Marx 1998). This is entirely consistent with Huber's observation that, of the thirty most widely assigned books on comparative politics reading lists, only four cover more than one region (Anderson 1983; O'Donnell, Schmitter and Whitehead 1986; Sartori 1976; and Rueschemeyer, Stephens and Stephens 1992). And, as noted in chapter one (see table 1.1), more recent scholarship in the field of comparative politics continues to exhibit a strong propensity to focus either on a single country or on cases within a single geographic area.

Given the heterogeneity of international or global problems tackled in comparative politics and related social science fields, this tendency is striking, at least from a methodological standpoint. For the many research questions that bear on different parts of the world, a focus on cases within one area, while potentially enriching scholarly discourse within an area studies community, risks truncating the range of variation represented by the full population of cases (see Geddes 2003, 97; and Mahoney and Goertz 2004, 654). Yet, focusing on the standard principles of case selection may involve investigating one or more cases about which a researcher has little background knowledge and even less experience in navigating context conditions, all of which puts at risk the credibility of the case study and the reliability of the comparative analysis. For area specialists, there is also a *practical* dimension to this trade-off. Investing in training and accumulated expertise in a single area (including language study) typically leads to sustained engagement with a multi-disciplinary research community united by shared concerns about a particular region despite cross-disciplinary differences in epistemic norms, methodological styles and evaluative standards. Yet, the kind of scholarship that might be most appreciated by such an interdisciplinary community might not resonate with researchers in one's home discipline. By the same token, an article focused on a single region may fail to impress the relevant area studies community if it sacrifices deep engagement with area-focused research in order to embrace the methodological conventions necessary to be published in a flagship journal of a social science discipline.

It might be suggested that these trade-offs can be bypassed through mixed-method strategies, wherein qualitative research focused on one's area of expertise is triangulated with statistical analysis and/or formal modeling intended to uncover broader cross-regional patterns. The notion of triangulating different methods to offset method-specific variance first appeared in

psychology (Campbell and Fiske 1959) before being deployed in other fields such as anthropology, sociology and organizational research (Denzin 1978; Jick 1979). In political science, Sidney Tarrow (1995) explicitly invoked the term "triangulation" to capture how quantitatitive and qualitative methods could be fruitfully deployed at different stages of research, depending on evolving situations and opportunities. While this is an entirely reasonable proposition, a more reified view of mixed-method research has proliferated rapidly, especially in the United States, partly in response to KKV's (King, Keohane and Verba, 1994) efforts to stipulate uniform methodological principles and inferential logics that purportedly undergird quantitative, qualitative as well as interpretive research. As David Laitin (2003, 169) argues, a "tripartite" combination of rich qualitative narratives, statistical analysis and formal models represents "the best defense we have against error and the surest hope for valid inference." From this perspective, the value of area-specific qualitative research for the social sciences depends on whether it supports or reflects general propositions derived from elegant formal models (Levi 2004) and/or statistical analyses (Fearon and Latin 2008; Lieberman 2005).

Yet, as Amel Ahmed and I (2012) have argued elsewhere, mixed-method research is neither risk-free, nor without some trade-offs of its own. For starters, it is potentially vulnerable to problems of incommensurability given that some methods are founded on vastly different conceptions of "truth" and "evidence" (Chatterjee 2009; Goertz and Mahoney 2012; Kratochwil 2007). In such cases, a forced triangulation of methods can lead to the danger of conceptual over-stretching (Ahram 2011c) or mismeasurement (Saylor 2013) as the same variables are redeployed within different approaches intended to produce fundamentally different kinds of insights cast at different levels of abstraction. Moreover, discussions of mixed-method research tend to discount the epistemological heterogeneity of qualitative research, presuming the main contribution of qualitative research to be drawing upon the "texture and detail of individual cases" to lay out causal pathways (Gerring 2016: 5). To be sure, methods texts still make reference to different strategies for applying the comparative method (George and Bennett, 2005; Goertz, 2006; Mahoney and Thelen, 2015). Advocates of mixed-method research, however, cast qualitative analysis in a limited role: close-up process tracing analysis of a well-fitted case that usually confirms and illuminates a general proposition derived statistically or deductively. There is value in such a strategy for understanding how abstract propositions might unfold on the ground. Yet, the rationale for most (not all) mixed-method research appears to at least implicitly

devalue the distinctive contributions of both context-bound interpretive work of a particular site as well as small-N studies designed to leverage the comparative method. None of this implies that mixed method research ought to be discarded – only that it does not consistently produce "better" truths and thus should not crowd out various kinds of stand-alone qualitative research -- including single case studies and small-N comparisons.

That still leaves us with the problem of managing the aforementioned methodological and practical trade-offs between investing in area-specific training and research, on the one hand, and pursuing broad findings that might be seen as advancing disciplinary knowledge, on the other. Even if these trade-offs can never be overcome, the different strategies for managing them can lead to different sets of empirical insights or theoretical intuitions while expanding the scope for fruitful conversations across area studies communities and various social science disciplines. One promising yet under-utilized approach, this volume suggests, is the strategy of cross-regional contextualized comparison, a key pillar in the broader pursuit of comparative area studies (CAS). Indeed, cross-regional contextualized comparison may be viewed as an alternative form of "triangulation" – not by combining discrete approaches but by pooling contextualized observations and interpretations in the course of examining cases situated in two or more different regions. Such an approach certainly demands more from an area specialist than would a single case study or a comparison of cases that fall within one's primary area of expertise. But, it is no less challenging for scholars to expand their methodological tool-kit to encompass the different types of skills and techniques required to carry out a mixed-method project. In fact, qualitative comparisons that cross different areas, although they place additional burdens on scholars as they grapple with cases in less familiar regions, may be easier to manage since the analysis of each case proceeds on the basis of essentially similar ontologies and epistemological assumptions. Moreover, the challenge of incorporating local context conditions in cases that fall within one's primary area has recognizable analogs when one turns to cases situated in other areas. At the same time, cross-regional contextualized comparison facilitates the triangulation of insights from different sets of comparable cases, potentially generating novel analytic frameworks and illuminating theoretically significant connections between scholarly debates unfolding in separate area studies communities.

Below, the first section reviews the important contributions of, and current challenges facing, area specialists whose disciplinary home is in the social sciences. The next section

revisits the distinctive features and payoffs of cross-regional contextualized comparison, which is situated in between Millean macro-comparative analysis and intra-area small-N comparisons. The following two sections offer examples of cross-regional contextualized comparison, first in the context of stand-alone qualitative research conducted by scholars who have ventured beyond their primary areas of expertise in search of fruitful comparisons, and then in the context of mixed-method research design where cross-regional comparisons can provide more compelling empirical support for a general argument than would be possible through intra-regional case-studies and comparisons. The final section stresses that the broader approach of CAS has a distinctive role to play in making the work of area experts more visible and recognizable to those studying similar phenomena in other areas of the world as well as to generalists in social science disciplines.

The Resilience – and Continuing Relevance – of Area Studies

During the 1990s, some scholars in American political science began to take the position that area specialists in the discipline were not sufficiently concerned with methodological rigor (e.g., Bates 1996, 1997; Laitin 1995). This view gained traction in part because this period also witnessed a steep decline both in funding for area-studies centers and in the participation of political scientists in area-studies conferences and organizations. At the time, some scholars staunchly defended the theoretical contributions area specialists had made to political science, viewing efforts to diminish their status in the discipline as intrinsically tied to the hegemonic project of rational-choice theory (Johnson 1997; Lustick 1997). True, resources for area studies centers *had* declined, but as Lustick (1997) noted, this was less a response to the quality of area studies scholarship and more a consequence of the end of the Cold War, which had provided a key rationale for the large-scale funding the study of foreign countries, histories and cultures. Ultimately, as Erik Wibbels (2007, 39) notes: "The events of September 11, 2001, seem to have underscored for many the value of country- and region-specific knowledge. The more militant calls for the end of area studies have thankfully disappeared."

It now seems clear that earlier reports of the death of area studies have been exaggerated. As noted in chapter one, European countries are continuing to invest in research and training

through established area studies centers (such as SOAS, the School for Oriental and African Studies at the University of London) and expanding multi-area institutes (such as GIGA, the German Institute for Global and Area Studies). Even in the United States, where government funding for area studies research continues to shrink, many of the area studies organizations that experienced steep declines in membership and funding during the 1990s appear to have experienced a revival, with private funders stepping in and social scientists continuing to play important roles in many of these associations.[1] Area specialists in the social scientists continue to produce research that is published in area-studies journals as well as well-known social science journals such as *World Politics* and *Comparative Political Studies* (Munck and Snyder 2007a), while reputable presses regularly publish monographs focused on particular countries or regions of the world. The vast majority of award-winning dissertations in such fields as comparative politics are by young scholars trained as experts in particular countries or areas.[2] Universities and liberal arts colleges are still rostering courses devoted to the politics, history and culture of major countries and world regions, and thus still seek to hire scholars who have expertise to teach these courses (Moseley 2009). And, scholars and policymakers dealing with foreign affairs – in the United States and several other countries – have been more inclined to seek out area studies research and historical case studies than purely statistical analyses or formal models (Jordan et al. 2009).

Also telling is the number of strong programmatic statements that have sought to lay out the intrinsic value of area-focused scholarship (Ahram 2011b; Fukuyama 2004; Hanson 2009; Kuhonta, Slater and Vu 2008; Moseley 2009; Pepinsky 2015; Sil 2009). One recurrent theme in these statements is the recognition of the contributions of an earlier generation of area specialists

[1] The Middle East Studies Association (MESA), which was constituted in 1966 with just 55 members, claimed 2600 members in 2001 and now claims over 3000 members. With over 8000 members, the Association for Asian Studies (AAS) continues to be the largest single academic organization dedicated to the study of a geographic area. And, the area studies association that saw the steepest decline in membership among social scientists after the Cold War –the newly renamed Association for Slavic, East European, and Eurasian Studies (ASEEES) – has launched new initiatives to draw social scientists back into the organization even as the Council of European Studies has expanded its focus beyond Western Europe to cover Central and Eastern Europe, including Russia.

[2] In the United States, of the 29 dissertations awarded the Gabriel Almond Prize for Best Dissertation in Comparative Politics between 1990 and 2015, the main empirical findings in all but three of these were drawn from a single area.

to concepts that have endured in the social sciences (Hanson 2009; Johnson 1997; Kuhonta 2014; Kuhonta, Slater and Vu 2008; Sil 2009). For example, the concept of "consociationalism," initially constructed on the basis of a detailed study of the Netherlands (Lijphart 1968) continue to influence debates over the design of democratic institutions in divided societies more than a quarter century later (Gabel 1998; McGarry and O'Leary 2004). Similarly, the concept of "corporatism," once employed in a single-country study of Brazil (Schmitter 1971), has been redeployed on a regular basis, including in studies of Europe (Berger 1981; Gorges 1996; Lehmbruch and Schmitter 1982) and East Asia (Lee 1998; Unger and Chan 1995). In comparative political economy, schemes for classifying welfare-states in advanced capitalist countries (Esping-Anderson 1990) have been adapted to differentiate social policy in post-communist economies (Bohle and Greskovits 2012; Orenstein 2008), while elements of the "capitalist developmental state" first outlined in a study of Japan (Johnson 1982) feature in recent studies on the role of the state in directing economic liberalization, including in Brazil, China, India and Russia (Breslin 2011; Pedersen 2008; Wengle 2014). And, the idea of the rentier state, which originated in the study of Iran (Mahdavy 1970), remains at the heart of current debates over the "resource curse" across Africa, Latin America, Southeast Asia and the Former Soviet Union (Dunning 2008; Luong and Weinthal 2010; Ross, 2012; Treisman 2010). Even students of Eastern Europe have turned what was seen as a major failure of an "old" area studies community -- their supposed inability to predict the velvet revolutions of 1989 – into an asset, employing post-communist transformations to refine the broader application of such general concepts as path dependence, spatial diffusion, and temporal context (e.g., Ekiert and Hanson 2003; Grzymala-Busse 2011; Pop-Eleches and Tucker 2017). These examples demonstrate that the quest for social science theory and the pursuit of area-specific knowledge have never constituted a zero-sum game.

Yet, for the purposes of the argument developed below, two things are worth noting. First, the staying power of important concepts has depended on being able to fruitfully deploy them to study regions other than the one where they first emerged. Second, there has been a substantial time-lag between the initial use of a concept in a particular area and the later efforts to apply that concept in relation to analyzing countries in other areas. In most of the examples noted above, it often took a decade or more before analytic constructs developed from the study of a given region could be fruitfully deployed more widely. At least one reason is that

investment in area expertise and specialization in substantive niches within a discipline combine to create segmented research communities with few built-in channels for the communication or diffusion of ideas. The many permutations of substantive and area expertise make for a vast, wide-ranging array of research which gets compartmentalized so that many potentially relevant studies may remain hidden from view from scholars focused on any one area and substantive issue. Of course, scholars studying the evolution of social policy in Europe need not follow research on ethnic conflict in sub-Saharan Africa. But, in the context of a given substantive research agenda, it is only to our collective advantage to encourage qualitative studies that examine cases from different regions through a common analytic lens. Such studies are in a position to create links across otherwise hermetic clusters of area-bound scholarly discourse and to identify patterns of similarities and differences that lead to conceptual refinements or alternative causal accounts. The following section turns to what distinguishes the particular form of comparative analysis emphasized in CAS – cross-regional contextualized comparison –from other, more common, modes of small-N analysis.

Evolving Varieties of Small-N Comparative Analysis: Where Does CAS Fit In?

During the heyday of modernization theory (1950s-70s), area specialists in the social sciences could comfortably coexist with scholars engaged in cross-regional macro-comparative analysis as well as large-N analysis. At the time, the analytic scheme of structural-functionalism provided a unifying evolutionary logic and a common theoretical vocabulary that guided single-case studies, quantitative studies, as well as small-N comparisons within and across areas. So long as scholars were working within the modernization paradigm, an analysis of the evolution of political culture in countries situated in different regions (e.g., Almond and Verba 1963) was not seen as fundamentally different from a study of the development of mass media within a single area (e.g. Lerner 1958).

With the decline of modernization theory, contending theoretical approaches (such as historical institutionalism and rational choice theory) gained footholds across many social science disciplines. The competition among them was seen by some as fruitful for refining each of the approaches (Lichbach 2003) or creating the conditions for eclectic theorizing (Sil 2004; Sil

and Katzenstein 2010). Yet, in the absence of a unifying analytic scheme, differences across methods and research strategies became the subject of increasingly heated debate. For the purposes of this volume, what is significant is the divergence between two distinct modes of small-N analysis – one driven by the logic of Mills' methods and aimed at producing causal generalizations, and one designed to utilize area expertise to ensure proper attention to historical and social contexts. For example, Theda Skocpol's (1979) sweeping comparative study of the French, Russian and Chinese revolutions for some represented an exemplary application of Mills' methods as well as a key theoretical contribution for the general study of revolutions; yet, each of the case studies drew criticisms from country experts who faulted her for ignoring key historical contingencies and alternative narratives (e.g. Burawoy 1989). Such criticisms reflect a wariness among area specialists of sweeping cross-regional comparisons where cases become sites for extracting empirical observations to support theoretical claims without commensurate attention to respective local contexts or contentious scholarly debates within the relevant area studies communities. From the other side, King, Keohane and Verba's (1994) treatise on research design spurred the view that much area-focused work had become too descriptive and idiosyncratic to be of much use to advancing disciplinary knowledge. Scholars doing research on a single region either needed to proactively restrict the scope of their claims or explain whether and how their analyses had generated valid inferences that social scientists should take seriously. Even some country specialists began to argue in favor of greater attention to disciplinary expectations of rigor and relevance so as not to become marginalized (Lees 2006).

In a post-KKV era (Mahoney 2010b), however, all styles of qualitative research appear to be under pressure to demonstrate their value in the face of advances being made in statistical analysis and mathematical modeling. That value, as noted above, has been framed in relation to its primary role within mixed-method research: the detailed tracing of causal processes in specific locales insofar as these reflect the operation of general logics or mechanisms derived through other neo-positivist methods. Such a view implicitly diminishes the significance of stand-alone qualitative research, whether focused on a particular geographic region or analyzing cases according to the strictures of the comparative method. Under these conditions, area specialists now have reason to take a more favorable view of cross-regional comparative work, and the latter have more reason to delve into – rather than seek to bracket out – the case-specific complexities and contextual particularities held to be relevant by country or area specialists.

Indeed, cross-regional comparative research is increasingly being done by scholars who *are* trained as country or area specialists and thus are conscious of local complexities and area-specific discourses, even as they seek to incorporate some of the analytic advantages of the comparative method. This is precisely where the programmatic effort of comparative area studies (CAS) has gained currency, especially in its articulation of *cross-regional contextualized comparison* as a distinctive approach that, while not superior to area-bound or Millean small-N studies, comes with a distinctive set of payoffs and trade-offs.

In chapter one, we traced the term "contextualized comparison" back to Locke and Thelen (1995) who were writing on comparative research on labor politics. Their argument represented an important intervention, highlighting how seemingly standard measures of various aspects of labor politics (say, the frequency of strikes) might mean quite different things depending on the content of labor laws and design of labor institutions. Locke and Thelen did not see this as sufficient reason to abandon cross-national comparative research. Instead, they laid out a strategy for making adjustments on the basis of careful consideration of the national *context* in each case. This basic notion has since been translated by others into a more general strategy, including by Pierson (2003) who refers to the process of adapting context-specific insights so as to permit comparative analysis. Here, following Pierson, *cross-regional contextualized comparison is distinguished by the fact that, while cases are selected from different areas to afford a degree of control on key variables, there is also 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.* This type of comparative approach must eschew universal causal laws and limit itself to what Merton (1968) characterized as "middle-range" theoretical propositions. Such propositions *are* portable beyond a single region within a bounded set of comparable contexts where specific cause-effect links recur across time and space. At the same time, they seek to accommodate relevant case-specific contextual conditions – as articulated in scholarly debates among area specialists – that can affect whether and how specific causal links acquire greater significance in relation to an outcome.

Cross-regional contextualized comparison cannot eliminate the methodological and practical trade-offs between leveraging the comparative method to generate portable insights and making full use of one's area-specific training and knowledge. It does, however, represent a

distinctive approach to these trade-offs – one that can simultaneously triangulate insights from more wide-ranging sets of comparable cases drawn from different regions, engage scholarly debates among area specialists in order to better contextualize specific observations in relevant local and temporal contexts, and stimulate the diffusion of ideas among social scientists belonging to different area studies communities. The distinguishing features of cross-regional contextualized comparison can be best understood by differentiating it more systematically from area-bound small-N studies and macro-comparative analyses predicated on the comparative method (see Table 13.1).

Table 13.1
Expertise and Portability in Varieties of Comparative Approaches

Approach	***Expertise***	***Portability***
Single case	*very high*	*very low*
Area-bound small-N	*high*	*low*
Cross-regional contextualized small-N	*medium*	*medium*
Macro-comparative small-N	*low*	*high*
Large-N	*very low*	*very high*

Area-bound qualitative research can involve more than one case, but the selection of cases is first and foremost intended to leverage the language skills and area-specific knowledge of a scholar who can produce rich, fine-grained narratives about the cases. This limitation does not allow for much consideration to the question of the representativeness of the cases at least insofar as any emergent findings might speak to general theoretical propositions. There are certainly questions for which area-bound comparative inquiry is appropriate, and perhaps even more desirable, than

cross-regional comparison. This may be true where the entire range of variation across the full population of possible cases may be captured by a set of cases within an area. This is the case, for example, in Dan Slater's (2010) comparative study of contentious politics and political order in Southeast Asia, where the range of differences between the five cases compared are presumed to match the range of differences across the full population of cases across different regions. There are also situations where the scope conditions of a question happen to match up with characteristics present in a specific region but not others. For example, there is much to be gained by comparing the trajectories of polities descended from a multi-national empire with comparable historical legacies (Hanson 2009), as is true for countries that emerged from the Spanish empire in the Americas (e.g. Mahoney 2001b, 2010b) or were once part of the Soviet bloc (e.g. Hale 2014; Pop-Eleches and Tucker 2017). In such circumstances, there is little to be gained by taking on the additional risks and effort required to examine cases from other regions in a context-sensitive manner.

For most general problematiques considered important for social science disciplines, however, the potential range of variation is not likely to be contained within a single geographic area. In these situations, limiting case selection to a given area risks forfeiting the analytic leverage of the comparative method by artificially truncating the range of variation evident across the full population of relevant cases (Geddes, 2003: 97; George and Bennett, 2005; Goertz 2006; Mahoney and Goertz 2004). Thus, cross-regional research in fields such as historical sociology and comparative politics has tended to take its cue from Mills' methods, which are predicated on empiricist assumptions not unlike those underlying causal inference in quantitative analysis (Sil 2004). The emphasis is on the systematic matching of cases so as to maximize control, but with little expectation of any prior training or research experience in relation to any of the areas covered. This type of small-N analysis must necessarily assume the universal equivalence of concepts and measures across diverse settings; there is no expectation of adjusting concepts or measures with due attention to local complexity and no presumption that a given case study must somehow grapple with area-specific intellectual traditions or scholarly debates.

Yet, when it comes to the analysis of individual cases, there is a risk of errors arising from the failure to account for local context conditions, including the challenge of having to contend with different kinds of sources and multiple historical narratives (Lustick 1996).

Without some attention to contextual specificities of a case, it can be difficult to "get the story right." This not only matters for the quality of the individual case studies but potentially undercuts the comparative analysis, making it difficult to code observations, measure certain variables or trace the varying effects of causal mechanisms across different spatio-temporal contexts (Falleti and Lynch 2009; Saylor 2013; Schatz and Maltseva 2012). Despite these challenges, macro-comparative small-N analyses have been valuable for refining concepts or articulating novel theoretical propositions. But, the costs and risks cannot be ignored.

As Table 13.1 suggests, cross-regional contextualized comparison is simultaneously more expansive than area-bound comparative inquiry in the range of questions and cases examined *and* more context-sensitive than Millean macro-comparative studies in pursuit of general theoretical propositions. Importantly, area expertise is not traded away for the sake of optimal experimental control or maximum generalizability. Rather, area-specific training and research experience is relied upon to provide deep contextual knowledge concerning the cases within one's primary area as well as key intuitions that facilitate more context-sensitive inquiry for cases from other areas. For each case study, it is necessary to situate observations within particular initial conditions and social environments, rather than simply coding them according to some standardized algorithm to facilitate a "quick leap from data to knowledge" (Schatz and Maltseva 2012). This also implies that, when comparing causal configurations across time and space, differences in context conditions need to be granted the same theoretical status as those recurrent mechanisms or linkages that are portable, with the former also impinging on the way concepts are operationalized and assigned causal weight (see also Falleti and Lynch 2009; Hall 2010; Saylor 2013).[3]

There is, however, a practical problem here. For most researchers, the same degree of prior expertise cannot be brought to bear on all comparable cases. And, it is not easy to find in a timely manner the "right" collaborators who will share a researcher's enthusiasm for a specific

[3] This view stands in contrast to the traditional positivist view in which the epistemological status of portable causal variables is far greater than that of context, which is relegated to the background essentially by fiat (e.g., King 1996). This is not an unreasonable position where the objective is to establish lawlike generalizations across a large number of observations. It is not, however, the position upon which the framework of CAS is founded since the elements of "reality" that are subject to theoretical analysis are not seen as producing variation in outcomes independent of the historical situations in which their significance has been recognized.

research question and approach case studies with the same degree of attention to the same set of context conditions when coding and interpreting case-specific observations. CAS opens the door to a researcher engaging in cross-regional comparison, drawing upon the training and experience of an area specialist not only to analyze cases within her primary area of expertise but also when developing a context-sensitive approach to those cases drawn from less familiar regions. The assumption here is that it is possible and desirable for a researcher to extrapolate from her area expertise when seeking to better account for the complexities and particularities of those cases within their regional contexts. This is true of the comparative studies showcased in Part Two of this volume as well as the books to be discussed in the following two sections. Indeed, the accumulated research experience as an area specialist on a particular substantive topic may even enable her to better understand the distinctiveness or origins of comparable empirical phenomena unfolding in different world regions area unnoticed by others. This is the case, for example, with a fascinating study by geographer Judith Carney (2001, cf. Moseley 2009) whose extensive training and fieldwork experience as an expert on rice farming in West Africa enabled her to first recognize, and then trace the origins of, similar patterns of rice cultivation that emerged in the southeast of the United States during the 17th and 18th centuries.

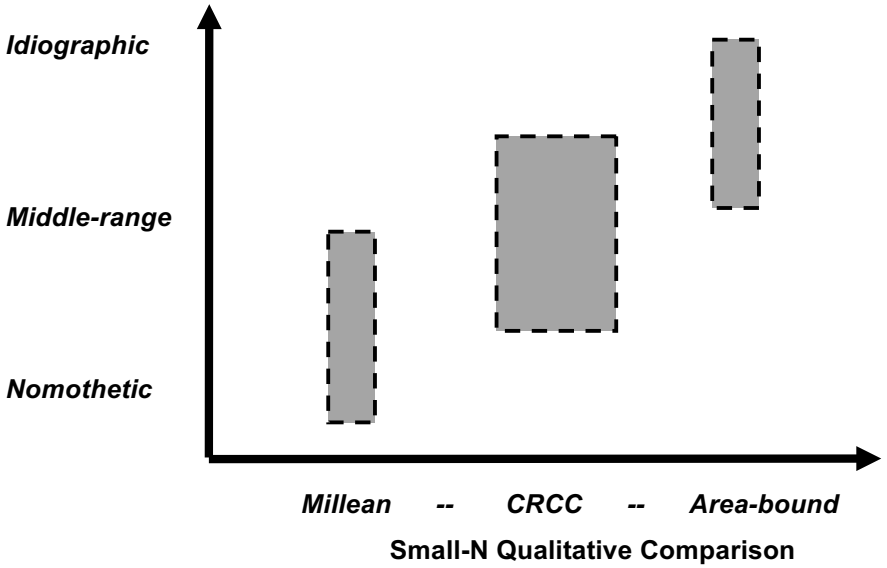
Importantly, because cross-regional contextualized comparison goes beyond one's primary area of expertise yet seeks to be context-sensitive, it requires at least some immersion in the contentious scholarly discourses among specialists for each of the cases. This is not simply for the sake of casting one's net widely in search of relevant empirical data. It is also for the purpose of adequately sampling diverse sources and contending historical narratives so as to counter the aforementioned risk of selection bias (Lustick 1996). For example, Stephen Hanson's study of the trajectories of nascent democracies in Third Republic France, Weimar Germany and post-Soviet Russia (discussed below as an example of cross-regional contextualized comparison) explicitly acknowledges the problem of selection bias when dealing with contending perspectives on crucial historical points: "One method for limiting this problem is to read as wide a range of historical scholarship on one's topic as possible – particularly when one's argument rests to a great extent on secondary sources, as is the case in this study—so as to avoid the form of selection bias in which one cites only those historians whose interpretations of the evidence fit one's preconceptions" (Hanson 2010: 81-2). Similarly, in my own comparative study of institutional borrowing and industrial organization in Japan and Russia (Sil 2002), the

case studies are consciously designed to be "sufficiently stylized so as to be comparable in view of the theoretical questions posed," while being "attentive to country-specific discourses... and to the diversity of historical accounts" (Sil 2002, 49). My training in Soviet/Russian studies was useful for building a context-sensitive accounts for both Russia and Japan while helping me differentiate contending strands of historiography and situate my arguments in relation to rival intellectual traditions in Japanese and Soviet/Russian studies (Sil 2002: 301-321). It is not necessary for all small-N studies to address the problem of selection bias in as explicit or elaborate a manner. But, one of the markers of *contextualized* cross-regional comparison is a self-conscious effort to employ some standard approach to sampling diverse historical sources and engaging area-specific scholarly debates for each of the case studies.

Finally, it is worth differentiating various modes of small-N comparison in terms of the range of epistemological perspectives with which each is likely to be compatible. As noted in chapter one, the broad distinction between nomothetic and idiographic styles of research captures many of the epistemological assumptions that bear on the status of area expertise in qualitative comparative analysis. Scholarship closer to the nomothetic pole at least implicitly tends to be founded on logical empiricism which, whether prioritizing statistical inference or axiomatic deduction from first principles, seek lawlike causal generalizations linked to theory-neutral observable regularities established through replicable analytic procedures (Shapiro and Wendt 1992). Towards the idiographic end are “thick” narratives that aim to understand and interpret a particular set of social relations and performative acts as understood and experienced by actors within their respective contexts (Wedeen 2010; Yanow 2013). Elsewhere, I have argued that these models should be viewed as ideal-typical poles of an epistemological spectrum, with much qualitative research in practice proceeding from assumptions situated somewhere in between (Sil 2000, 2004). Nevertheless, as Figure 13.1 suggests, there are elective affinities between different modes of small-N analysis and different ranges along this epistemological spectrum.

Figure 13.1

The Epistemological Range of Different Styles of Small-N Comparative Analysis



In general, Millean macro-comparative analysis tend to most commonly follow the same essential logic of causal inference that undergirds large-N analyses. Setting aside Mill's own cautions about using his methods for causal analysis in the social sciences, this approach comes closest to the nomothetic end given its objective of inferring causal generalizations through the controlled comparison of cases matched on the basis of different mixes of attributes and outcomes (Gerring 2016). Yet, some variants of this approach can move in the direction of middle range theorizing depending on the level of attention paid to distinctive complexities in each case and on the extent of engagement with scholarly debates among country specialists. Barrington Moore's (1966) classic *Social Origins of Dictatorship and Democracy* seeks to trace the long-term effects of a particular configuration of class relations on the likelihood of democracy in much the same way that Skocpol's (1979) study of revolutions seeks to identify the origins of social revolution based on the explicit application of Mills' methods to a set of comparable cases. However, Moore's study ends up providing not only more detailed historical case studies with more extensive footnotes concerning sources, but also includes a discussion of conservative historiography and a note on the challenges of comparing political processes in Europe and Asia. While both represent well-known examples macro-comparative small-N

analyses, Skocpol may be positioned closer to the nomothetic end of the range (closer to the bottom and left of figure 13.1), whereas Moore is closer to the midde of the nomothetic-idiographic continuum given the effort to take into account the impact of regional historical patterns and grapple with complex issues in historiography in many of the cases.

Along the right of the figure, area-bound small-N comparisons area-bound comparative studies can be driven by an essentially positivist objective of helping to uncover a causal explanation evident in large-N studies or macro-comparative studies. However, the focus on cases drawn from a given region intrinsically limits the possibility for building towards universal causal laws or general theories. It is true that, for some research questions, regional attributes may be treated as controls in a "least different" systems design, as in the case of comparing transitions across countries with similar communist legacies (e.g. Ekiert and Hanson 2003; Hale 2014; Pop-Eleches and Tucker 2017). But, in this situation, even if an area-bound small-N study may prove valuable to more expansive nomothetically oriented endeavors, the causal stories for each of the cases as well as the cross-case comparisons are bound within regional contexts and cannot independently support broader causal generalizations without further research on other comparable cases. Area-bound inquiry is thus most likely to cover the range from the middle of the nomothetic-idiographic spectrum to the idiographic end, where cases are driven less by the logic of the comparative method and more by intrinsic interest in deepening scholarly understanding of social interactions within a historically and culturally bounded region. Even when explicitly comparing multiple cases, the more idiographically oriented studies at best provide "contrast of contexts" (Skocpol and Somers, 1980). The aim is to provide a rich, detailed narratives intended to illuminate the variety of social and political processes unfolding across a single region as, for example, in the case of Bayat's (2007) study of the interactions between evolving Islamic practices and the dynamics of social movements across the Middle East.

Cross-regional contextualized comparisons, as defined here, are small-N studies that occupy a range that is centered on an approximate mid-point between the idiographic and nomothetic poles. Such studies embrace an ontology that foregrounds the complex interactions among general causal effects and the specific attributes of given historical contexts, choices, and sequences (Falleti and Lynch, 2009; Hall, 2003). This type of mid-range small-N comparisons also bridges the chasm between qualitative work closer to the idiographic and nomothetic ends of the spectrum. The attention to context-sensitivity requires engagement with strands of historical

and interpretive analysis by area specialists focusing on their countries or areas of expertise. At the same time, the selection of cases with some attention to the logic of the comparative method opens the door to conversations with those pursuing parsimonious causal explanations and universal theoretical generalizations. The value of such an approach is thus in part analytic and in part dialogical. That is, researchers engaging in cross-regional contextualized comparison are in a position to hit upon distinctive packages of theoretical and empirical insights while also expanding the channels for communication across different area-studies communities as well as between area specialists and their respective social science disciplines. The chapters in Part Two of this volume were selected in part to highlight these possibilities. But, they are neither outliers, nor without precedent. The next two sections briefly consider a handful of earlier book-length studies that may be viewed as essentially adopting a strategy of cross-regional contextualized comparison albeit without referring to it as such or distinguishing it from other modes of small-N analysis.

Triangulating Areas in Qualitative Research: Wood, Kohli, Hanson, Brownlee

In her Letter from the President (of the Comparative Politics section of the American Political Science Association, Evelyne Huber (2003: 1) bemoaned the dearth of systematic cross-regional comparative analysis in political science. Cross-regional comparisons are indeed a very small percentage of book-length qualitative research; single-case studies and comparisons of cases within a single area constitute the vast majority of such research. At the same time, some of the most important works in the social sciences feature cross-national comparisons produced by area specialists. This section focuses on examples of a few books, all by scholars with area expertise in one or more conventionally defined areas, that involve small-N comparisons of cases drawn from different areas in order to develop or evaluate mid-range theoretical propositions about a given phenomenon. These studies show how cross-regional contextualized comparisons carried out by researchers trained as area specialists can make stand-alone qualitative research more compelling and impactful within social science disciplines. The next section will turn to cross-regional contextualized comparison that supports the qualitative component of mixed-method work.

Elisabeth Wood's (2000) comparison of the end of insurgencies and the negotiation of democratic pacts in two countries located on two continents: El Salvador and South Africa. Wood's primary field of expertise is Central America, her language skills are limited to Spanish and Portuguese, and her research began with extensive fieldwork in El Salvador featuring interviews with not only government officials and party leaders but also field commanders of various insurgent guerrilla forces. However, she put off a detailed study of El Salvador that would later appear in a separate book (Wood 2003) and opted to delve into the case of South Africa. While Wood did carry out fieldwork and interviews in South Africa, she was not trained as an Africanist, did not speak any of the native languages beyond English, and limited her interviews to a significantly narrower range of actors (politicians, business groups, trade union officials). The point is not to raise doubts about Wood's treatment of South Africa, but rather to highlight the intellectual payoffs of her bold decision to delve into a second case *in spite of* not having extensive prior expertise on that case. That decision led to a paired comparison in which she was able to leverage a "least similar systems" research design that effectively made her argument more compelling to a wider audience. And she did this with a sensitivity to the context that was only possible because she had previously amassed an impressive amount of country-specific expertise that would not only be useful for one of the two cases but could also inform her judgment in designing her empirical investigation into the other case.

Similarly, Atul Kohli (2004) goes beyond India, the country that was the subject of his first two scholarly monographs, to compare the evolution of "state-directed development" in Brazil, India, Nigeria and South Korea. The small-N comparison reveals different initial conditions linked to the emergence of distinctive patterns of state intervention that produce varying levels of success in promoting industrialization. Kohli's intimate familiarity with India's colonial history and contemporary political economy, serve him well as he seeks to engage contentious issues in the historical case studies – most notably in the case of South Korea, where the experience of Japanese colonialism still weighs heavily on contending arguments about Korean politics and political economy. At the same time, the theoretical categories that Kohli employs to distinguish causally significant patterns of colonial state administration transcend this particular set of cases and provide a template for comparing post-colonial state-society relations across a wider expanse of time and space. Nigeria becomes an example of a "neopatrimonial" variant, to be distinguished from the "cohesive capitalist" variant in South Korea, with the other

two countries representing cases of "fragmented multi-class" state-society relations. These three models, while exemplified by the cases attached to them, are intended to be applicable to other cases, but not without in-depth research into colonial administrative practices and their impact on various social groups in each context.

In much the same way, Stephen Hanson (2010), originally trained as a political scientist with expertise in Soviet/Russian studies, offers an ambitious comparative-historical study that take advantage of a geographically diverse set of matched cases from different time periods – post-Soviet Russia, Weimar Germany, and Third-Republic France – to develop an argument about the role of ideology in shaping party formation and regime stability. The argument for each case is carefully developed with attention to the perspectives of key political actors attached to different political parties, with the more successful ones associated with clear ideological positions that elongated time horizons for their members. The absence of ideological clarity is a key reason why liberal parties in Weimar Germany splintered at a critical time in the 1920s, whereas the French republicans and legitimists were able to consolidate parties that would endure and help consolidate French democracy. In post-Soviet Russia, it is the left-wing Communist Party and the right-wing Liberal Democratic Party that showed the most staying power over the first fifteen years, owing mostly to their clearly intelligible and consistent ideological principles, which enabled a degree of unity not seen among other parties that shifted their agendas to match changing circumstances. While it is possible to detect indications of Hanson's long-standing expertise and deeper familiarity with respect to one of the three cases, post-Soviet Russia, Hanson makes a strong case for the usefulness of the other two cases given the shared initial conditions and diverse outcomes with respect to his main research question. Yet, he is fully aware that this limited set of cases cannot control for all possible variables and that "no two historical situations are ever fully alike" (Hanson 2010: 81). And, as noted above, he is very conscious of the problem of selection bias in the handling of secondary sources for each of the cases, particularly the two he is less familiar with. To counter this problem, he consciously seeks out wide-ranging perspectives on the relevant time periods for each of the countries, taking care to address controversial issues and to refrain from seizing on convenient data points that facilitate easy comparisons and may appear to bolster support for his preferred hypothesis. The result is a comparative study that seriously engages country-specific narratives on the twists and turns of political history while building a portable argument about the role of

ideological consistency in ensuring the longevity of parties and, therefore, the robustness of democracy.

While the above examples are of studies by established comparativists whose initial training focused on expertise in a single region, it is possible to find first books based on doctoral dissertations featuring cross-regional comparisons.[4] One is Jason Brownlee's (2007) analysis of the pillars that sustain authoritarian rule in certain settings but not others. Brownlee cuts across Middle Eastern and Southeast Asian studies to develop a comparable set of cases featuring Egypt, Iran, Malaysia and the Philippines. The comparative study is designed to explain why electoral authoritarianism helps to preserve authoritarian rule in some cases (Egypt, Malaysia) while engendering more democratic contestation in others (Iran, the Philippines). Brownlee's Arabic language skills presumably aided his field research in Egypt, and his broader training as a Middle East area specialist likely gave him substantial background for Iran. But, by venturing into Malaysia and the Philippines despite the absence of a similar level of prior expertise in the Southeast Asian region, Brownlee is able to make a more compelling case for the portability of his argument. That the variation in outcomes cuts across the two regions helps to strengthen Brownlee's theoretical claims about the importance of soft-liners who can press forward when a ruling party is unable to manage conflicts among elites. At the same time, the evidence is based on at least some fieldwork in both regions, with attention to country-specific scholarly debates as well as to the broader historical contexts shaping the emergence and structure of authoritarian regimes in each case.

Triangulating Areas in Mixed-Method Research: Lieberman on Taxation and AIDS Policy

Most mixed-method studies tend to rely either on very thin case studies or on detailed analyses of single areas. This is not, however, the case with Evan Lieberman, one of the best-known proponents of mixed-method research. In his "nested analysis" model (Lieberman 2005, 2015), regression analysis facilitates unbiased case selection (by establishing the frequency distribution

[4] First books that compare cases from different areas, while unusual, are not impossible to find. In fact, while not discussed here, several of the authors featured in this volume have also written first books of this sort: Ahram (2011a); Ahmed (2013); Chen (2007); Saylor (2014); Sil (2002); and Smith (2007).

of outcomes) and helps identify the most relevant mechanisms (through statistical estimates of the relative strength of variables). At the same time, historical case studies are required to operationalize these mechanisms in particular contexts and to show how they actually contribute to the unfolding of causal processes leading to distinctive outcomes and cross-case variation. For our purposes, what is most intriguing is Lieberman's empirical work, which demonstrates that the qualitative component of mixed-method research can be more compelling when it features in-depth analysis of two or more cases chosen from different regions. This is evident in both Lieberman's (2003) comparative study of taxation in Brazil and South Africa as well as his later (2009) study of AIDS policy in Brazil, South Africa, and India.

In *Race and Regionalism* (Lieberman 2003), the qualitative portion of this mixed-method study easily stands on its own as an impressive contribution to Latin American and African studies as well as to comparative political economy. Lieberman (2003: 34-35) is conscious of the fact that his chosen cases are necessarily selected from different areas because of how much leverage this particular pair of cases offers: "Although the countries are situated in different world regions, different languages are spoken there, and some other obvious differences exist, the selection of South Africa and Brazil as the foundation for their analysis is due largely to their great similarities in social, economic, and geopolitical terms." At the same time, Lieberman is able to deftly deal with chronologies, historical sequences, cultural environments and institutional contexts in part because of his sustained exposure to African studies from his days as an undergraduate at Princeton through his doctoral studies at Berkeley, where he also acquired expertise on Latin America. The case studies of Brazil and South Africa rely on archival research and interviews to reconstruct the path of institutional development across various critical junctures. The emergent historical-institutionalist explanation for the particular outcome in each case depends on tracing the evolving motivations of upper-class actors in the choice of tax policies within the context of a given conception of the national political community. The paired comparison, even absent the statistical analyses offered in the book, enable a complex account of the variation across Brazil and South Africa, one that demonstrates which factors mattered most, and when and how.

Lieberman's (2009) more recent *Boundaries of Contagion* also stands out for its leveraging of Brazil and South Africa, alongside a sub-national comparative analysis of Indian states, in addressing the question of why some governments have more effective and efficient

responses to AIDS than others. In contrast to those who focus on the capacity and willingness of states to provide effective responses, Lieberman's general argument essentially focuses on the demand side, making a compelling case for how the institutionalization of ethnic divisions influence the extent to which the conditions and concerns of the most/least affected populations are actually revealed to governments. Lieberman establishes the initial plausibility of the argument through a quantitative analysis. But, as in *Race and Regionalism,* the most intriguing part of the evidence is in the form of a combination of cross-national and within-country comparisons designed to reveal two sets of mechanisms that link the initial conditions to the final outcome: the most affected groups fear the social stigma that may be attached to their groups should they publicly acknowledge their level of exposure to AIDS, whereas the least affected groups tend to feel themselves insulated from the problem. The deeper the institutionalization of the boundaries, the stronger the negative effect of both of these mechanisms on the likelihood of effective and efficient government responses.

Even to those who may be somewhat skeptical about the assortment of benefits conventionally attributed to mixed-method research, Lieberman's works represents an impressive exemplar of how to effectively triangulate quantitative and qualitative methods. But, this effectiveness derives in part from the fact that Lieberman also invests energy in triangulating careful analyses of historical cases drawn from different areas of the world. Had he only focused on one country or area, questions would have to be raised about whether the qualitative portion of the research served an independent function in the construction of the general theoretical argument, or whether it was primarily designed to illustrate inferences based on quantitative work (as is frequently the case in mixed-method designs where the qualitative work is limited to a single case study or a small-N study confined to a single area).

Conclusion

The examples discussed above, whether in the context of stand-alone qualitative research or mixed-method research, demonstrate the possibilities for carrying out cross-regional contextualized comparison even when one is initially trained as a specialist in one area. The works have made connections between, and added new wrinkles to, scholarly debates that were

taking place within separate area studies communities. They have also produced portable "middle range" propositions by triangulating insights drawn from different areas of the world and engaging in contextualized comparison. The contributions of these works do not imply that cross-regional comparative inquiry is superior to area-based inquiry – only that the former is a valuable complement to the latter and holds the promise of a distinctive array of intellectual payoffs. Indeed, as noted above, cross-regional contextualized comparison as well as the more general framework of CAS – which incorporates intra-regional (area-bound) comparisons as well as inter-regional comparisons (between entire regions) – benefits from, and seeks to showcase, the important contributions that researchers in various area studies communities have been making over the years. The basic thrust of CAS is not to subsume or supplant area studies scholarship but to encourage efforts to simultaneously engage multiple area studies communities while working with key concepts and problematiques that are of interest to key segments within social science disciplines.

CAS is also in a position to expedite the diffusion of theoretically significant ideas between area studies communities and across the social sciences writ large. As noted above, important concepts (e.g. corporatism) that came out of the analysis of particular countries or areas have proven to be useful for the study of other areas, but only after many years – or even decades – have gone by. Given that potentially similar or comparable insights generated by area-bound inquiry might get hermetically bounded, CAS is in a position to identify and translate similarly used concepts and similarly structured causal narratives across different area studies communities. It is also in a position to preempt or diffuse sharp debates resulting from social scientists focused on different areas with different context conditions. For example, in a well-known debate over the role of the state in development, Robert Bates' (1981) analysis of the dysfunctional role of the state in thwarting economic initiative and development in tropical Africa may be viewed as a challenge to arguments arising from the study of East Asian political economy that highlight the developmental state's effectiveness in spurring economic growth (Johnson 1982; see also Woo-Cumings 1999). Yet, the two arguments are not necessarily at odds, as demonstrated by Peter Evans (1995) who compared the experience of three states from three different regions (Brazil, India, and Korea) to create a framework for analyzing the conditions affecting the extent of a state's effectiveness in supporting industrial development. Cross-regional comparisons will not always reconcile diverse theoretical perspectives or advance

the cumulation of causal knowledge. But, the CAS framework offers clear evidence that the quest for disciplinary progress and the pursuit of area-specific knowledge have never constituted a zero-sum game.

Looking ahead, the question is not whether area studies add value to the social sciences, but rather how to effectively triangulate the insights generated by, and initiate productive conversations between, area studies communities and the disciplines that their members belong to. This does not require a consensus on "basic methodological rules of inference" (Wibbels 2007) or the negotiation of "shared standards" (Brady and Collier 2004). It only requires a more sustained, open-minded, mutually respectful dialogue between generalists and area specialists (Hanson 2009), along with "concerted efforts to improve and invigorate the scholarly synergy between region and discipline" (Kuhonta, Slater and Vu 2008: 2). In this context, CAS has a communicative and deliberative role to play, especially in uncovering connections between concepts, problematiques, debates and narratives among different communities of area specialists. From the perspective of area specialists, CAS can serve as a valuable ally, demonstrating theoretically interesting parallels or differences in the debates and studies generated within separate communities of area scholars. In engaging the case-specific arguments advanced as part of a broader project, different communities of area specialists can also join forces in defending the value of their work to disciplinary generalists who are skeptical of what single-area qualitative research can contribute on its own. From the perspective of more general theorists and practitioners of mixed-method research, a CAS framework provides a useful stepping stone in identifying crucial mechanisms or illuminating important contextual variables that might not be recognized in qualitative studies focused on single countries or areas. Thus, it behooves both area studies communities and social science disciplines to create more space for the kinds of research products that CAS encourages. Everyone stands to gain, and there is very little to be lost.

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