ZfVP 1 (2007) 1:105–124
DOI 10.1007/s12286-007-0009-3

AUFSÄTZE

ZfVP
ZEITSCHRIFT FÜR VERGLEICHENDE POLITIKWISSENSCHAFT

Area Studies, Comparative Area Studies, and the Study of Politics: Context, Substance, and Methodological Challenges

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Zusammenfassung Dieser Artikel bietet eine Einführung in jüngere Debatten über Area Studies und ihren weniger bekannten „Cousin" Vergleichende Area Studies. Obwohl aus politikwissenschaftlicher Perspektive verfasst, beziehen sich viele der in dem Artikel behandelten Aspekte auch auf andere Disziplinen. Wir zeigen zunächst einige der Entwicklungen und Debatten auf, die auf die Area Studies seit Ende des Kalten Krieges eingewirkt haben. Im Anschluss weisen wir auf einige zeitgenössische Verständnisse von Area Studies hin und präsentieren unsere eigene Definition von Vergleichenden Area Studies. Die Bedeutung sowohl von Area Studies als auch Vergleichenden Area Studies wird in einem weiteren Schritt herausgearbeitet. Besondere Aufmerksamkeit gilt im Folgenden zwei methodologischen Herausforderungen, vor denen Vergleichende Area Studies stehen: der Gebrauch von Konzepten und die Auswahl geeigneter Forschungsstrategien. Eine Zusammenfassung der zentralen Punkte schließt das Papier ab.

Schlüsselwörter Area Studies · Vergleichende Area Studies · Vergleichende Politikwissenschaft · Vergleichende Methode · Forschungsstrategie

Abstract This article provides an introduction to recent debates on area studies and its less well-known 'cousin' comparative area studies. Though written from a political science angle, many of the aspects covered in the article equally apply to other disciplines. We begin by noting the developments and debates that have accompanied area studies since the end of the Cold War. We then highlight some contemporary understandings

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of area studies and present our own definition of comparative area studies. The importance of both area studies and comparative area studies is spelled out in a further section. Two of the methodological challenges comparative area studies are faced with-the use of concepts and the choice of research strategies-are subsequently addressed in some detail. The paper closes by summing up the main points raised.

Keywords Area studies · Comparative Area Studies · Comparative Politics · Comparative Method · Research Strategy

1. Area Studies in a Challenging Environment

During the past one-and-a-half decades, area specialists have experienced challenging times-both in terms of 'real-world' developments and in terms of academic debates. The disintegration of the Soviet empire and the fall of the Berlin Wall not only demanded new approaches in Soviet and Eastern European studies but also opened up new research opportunities. The post-Soviet landscape with its fifteen independent states and the 'new' Central and Eastern Europe provided an exciting new observatory for social scientists interested in the processes, implications and consequences of political and economic transitions (cf. Bonnell and Breslauer 2003). The end of the Soviet Union, however, did not cause the world to follow a linear trajectory towards liberal democracy. Instead, the third wave of democracy, which had also embraced Latin America and large parts of sub-Saharan Africa, petered out in the course of the 1990's, with many of the resulting regimes remaining halfway houses between democracy and authoritarianism (Carothers 2002; Croissant and Merkel 2004; Schedler 2006). Particularly but not solely in such 'hybrid regimes', the political (and economic) game continues to be shaped by informal institutions and their interplay with formal institutions (Lauth 2000; Helmke and Levitsky 2004, 2006; Köllner 2005; *Osteuropa* 2005).

The 1990's also saw the emergence of new economic powerhouses in Asia. China's economic reforms, which had been initiated in the late 1970's, have transformed the country's maritime provinces beyond recognition. China has become a major magnet for foreign direct investment. At the same time, the perception of a new 'yellow peril' is taking shape as people in the 'West' worry about jobs and energy deposits being gobbled up by an insatiable China. Moreover, while neo-realists warn that China's ascent and the ensuing geo-tectonic shifts in the region will not be peaceful, more domestically interested observers wonder how the country will be able to overcome its growing social strains (*Internationale Politik* 2005; Shambaugh 2006). And China is not the only rising star in the global economy: More recently, India has been lauded as another up-and-coming economic giant (*Foreign Affairs* 2006; *Internationale Politik* 2006). Until the Southeast Asian financial and economic crisis dampened the enthusiasm in the latter part of the 1990's, Asia's new self-confidence manifested itself in a prominent discourse on so-called Asian values. Whatever the intrinsic merit of this debate, the message was clear: The 'West' could no longer assume that its specific value-system - if there ever was such a thing - would provide the benchmark for the rest of the world (Mols and Derichs 1995; Thompson 2001).

The end of the Cold War also did not mean the 'end of history' in terms of security and peace. A global democratic peace has proven to be a mirage. The study of peace and war turned its focus to trouble-ridden areas in the South, particularly in sub-Saharan Africa and the Middle East, and to possible threats emerging from these regions. Africa south of the Sahara may represent the trend towards failed states and internal conflict, the latter often in a 'conflict trap' driven or fuelled by natural resources such as oil or diamonds (Collier et al. 2003). The spread of weapons of mass destruction, particular nuclear proliferation in Asia and the Middle East, keeps Western diplomats and think tanks busy. However, it is certainly 9/11 that has had the most crucial impact on both decision-makers and academics, possibly marking a new era in world history. The threat of a trans-national terrorism and the subsequent 'war on terror' may not be proof of a 'clash of civilizations' as suggested by Huntington (1996), but the search for causes of terrorism has clearly boosted the interest in regions such as the Middle East, South and Southeast Asia.

These developments delivered many new impulses for area studies. Yet, at the same time area studies drew criticism from a number of directions. First, the relevance of area studies in an increasingly globalised world was questioned. Globalisation, as epitomised by the spread of the Internet, would diminish differences between the regions of the world and would promote convergence and greater homogeneity in a number of are(n)as - or so its evangelists claimed. Rather than concentrating on national or local specificities (which were bound to diminish in the face of globalisation), the focus should now be on global trends or on overarching theories and analytical frameworks which could be fruitfully applied to whatever world region.

Such claims have often been rebutted. As Drake and Hilbink (2003: 26) have argued, local and regional traditions and politics shape reactions to the challenges of globalisation. While many different localities might be faced with similar problems, the answers to these problems continue to differ. In order to understand the mutually constitutive relationship between the global and the local, their interaction has to be studied. The fluid concept of globalisation has to be grounded in area studies. Understanding the local impact and manifestations of and reactions to global processes requires familiarity with and sensitivity towards individual regions, hence area expertise. In other words, globalisation does not diminish but in fact increases the need for area-based knowledge (see also Prewitt 2003; Sassen 2003). Still, the idea that globalisation pushes political, corporate, social and cultural practices and predilections towards some common point of convergence has proven to be a resilient one.[1]

Critiques of area studies have also come from other directions. Cultural critiques were developed from the perspective of the humanities and, at times, post-modernism. For one, the 'Orientalist' critique, which first had emerged in the mid-1970's in the Middle Eastern studies community in the US (cf. Mitchell 2003: 13–14), evolved into demands to re-conceptualise area studies in post-modern or post-structural terms. The aim of this exercise was to overcome allegedly existing prejudiced constructions of the object of knowledge. Deep-seated academic conceptions of 'us' and 'them', it was suggested, not only abetted continued real-world attempts at domination but shaped the way in which non-Western regions and their inhabitants were supposed to be perceived and understood. Solutions proposed as a way out of late-colonialist and supremacist perceptions of given

[1] Examples of this line of thought are the popular publications by Thomas L. Friedman (1999, 2004).

regions ranged from incorporating endogenous understandings and conceptions into research designs to taking onboard perspectives provided by either European social theorists (Bourdieu, Foucault, Giddens, Gramsci, Habermas, etc.) or South Asian and other 'subalterns' (Szanton 2003; see also Drake and Hilbink 2003: 22–24).

Related to the discussion about globalisation, it was also argued that area studies had to move away from their privileged and convenient focus on nation states as global and concomitant regional and local trends led to a de-territorialisation of what used to be (or sometimes never were) stable geographic units. Besides, it was suggested that a de-coupling of culture and geographic space had gotten underway on a worldwide level. In view of such trends, scholars recommended to pay more attention to trans-border phenomena such as diasporas, trans-national social spaces, regional trade, finance and social networks or to the impact of global flows of culture, media and the like on local identity construction (cf. Katzenstein 2001; Prewitt 2003; Eckert 2005; King 2005).

A third major academic debate in the latter half of the 1990's concerned the relationship between the 'scientific' disciplines and the allegedly not theory-based area studies. In the United States, comparative politics, the classical mainstay of social science based area studies, (re-)emerged as the major arena in that respect.[2] Comparative politics had always been a 'broad-tent affair'. Earlier attempts to achieve coherence in this branch of the political science discipline via a certain frame of analysis or methodology (structural functionalism, behaviouralism) had all foundered. The 1990's saw another such attempt, this time in the guise of an unifying theoretical framework which promised 'methodological rigour' and thus scientific respectability: rational choice theory. Many area specialists perceived attempts to mould comparative politics in one particular form as 'imperialistic'. They argued that empirical (and topical) relevance was sacrificed on the altar of theoretical coherence and that comparative politics would be the poorer for it (cf. Bates 1997; Katzenstein 2001). More recently, the 'methodological wars' in comparative politics in the United States have subsided and a more relaxed 'live-and-let-live' attitude can be observed. Contributing to this has been a growing understanding that while rational choice approaches do indeed have distinct analytical merits - especially in terms of explaining political phenomena in stable institutional settings - they do not constitute the only useful or indeed scientific instrument in the toolbox of comparative politics. Besides, as Munck and Snyder (2007: 25) note, it can be argued that 'blanket characterizations of area studies research as atheoretical or "merely descriptive" are simply misleading' […] [D]espite some differences between area studies and non-area studies work in terms of research objectives and methods, area studies do not constitute a distinctive approach [within comparative politics].'

Finally, the events of 9/11 have, at least in the social sciences, taken some of the sting out of the critiques levelled against area studies. As noted by Wibbels (2007), '[t]he 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.' The terror attacks on the United States and on other parts of the world, the continuing problems involved in the 'implantation' of democracy in Iraq, and the phenomenon of militant Islam more generally have led not only to an increase in public demand

[2] The area-studies-versus-political-science debate was not new. Indeed, there had been relevant discussions in earlier decades (see e.g., Pye 1975).

for regional expertise that is historically and culturally grounded while at the same time focused on current affairs. 9/11 and its aftermath have also made clear even to the most hard-headed proponents of the 'globalisation-makes-us-all-alike' thesis that things are slightly more complicated. While area specialists surely welcome the acknowledgment that area-based studies have not simply become obsolete because we no longer live in a Cold War setting, there is no reason for complacence. The debate about the future of area studies, the links between the disciplines and area studies, and the research methods and topics of area specialists is bound to continue.

2. What are Area Studies and Comparative Area Studies?

2.1 Area Studies

Area studies are not a unified field of study. For starters, there are a dozen or more regional objects of study (contested as some of these may be).[3] Some of them refer to broader (sub)regions of the world and some refer to individual countries (and possibly the diasporas which trace their roots to this particular part of the world). In many cases, but not always, the regions or countries in question share a common language or at least a limited number of common languages. There are Middle East studies, Latin American studies, African studies, Southeast Asian studies, Japanese, Chinese and Korean studies, Eastern European and Russian studies, and many more.

Many area specialists would probably agree with Szanton (2003) who suggests that "Area Studies" is best understood as an overarching term for a family of academic fields and activities joined by a common commitment to: (1) intensive language study; (2) in-depth field research in the local language(s); (3) close attention to local histories, viewpoints, materials, and interpretations; (4) testing, elaborating, criticizing, or developing grounded theory against detailed observation; and (5) multi-disciplinary conversations often crossing the boundaries of the social sciences and humanities. In a related vein, Prewitt (2003: 8), drawing on conceptualisations by the (United States) Social Science Research Council and the American Council of Learned Societies, distinguishes between, on the one hand, 'traditional area studies' and, on the other hand, 'area-based knowledge'. While the former take 'regions in their totality as their primary unit of analysis', with scholars 'seek[ing] to know all that can reasonably be known about a world region - its languages, history, cultures, politics, and religions', the latter 'starts with knowing about an area, but then using that knowledge to process trends and phenomena that transcend any given region'. Regardless of the particular definition used, what counts as area studies in different countries tends to diverge: Usually one's own geographical area is not counted in, while it might well be elsewhere. For example, Western European or EU studies would be considered area studies in some countries whereas such studies are usually perceived as mainstream disciplinary studies in Western Europe itself.

[3] 'Regions' are here simply understood as 'geographically bounded parts of the world that are commonly viewed as occupying the same large part of the world' (Mainwaring and Pérez-Liñán 2007: 201), i.e. we do not take an overarching common cultural, social, political, economic fundament of distinct regions for granted.

Different strands of area studies tend to differ in their dominant approaches and institutional frameworks. As Szanton (2003) rightly notes, 'the individual Area Studies fields are neither internally homogeneous, nor are they similar to each other. Indeed examined up close, they are strikingly distinctive in their political, institutional, and intellectual histories, and in their relationships with the disciplines.' Such important differences and institutional divisions within the various area studies help to organise and channel the respective academic debates and study programs.[4]

To sum up, 'area studies' is a cover term for a vast array of studies whose distinctive characteristic is above all their specific and rather exclusive focus on a single country or region. Neither a specific disciplinary background nor the use of certain methods define area studies: Area studies can be grounded in the humanities, the social sciences or in cultural studies and they make use of different methodological and epistemological approaches. In particular social-science based area studies can be used for testing, elaborating, criticising or developing local and universalistic concepts and theories on the basis of detailed observations of local phenomena (see also section 5 below). Intensive language study, in-depth field research conducted in local languages, and multi- or interdisciplinary cooperation, we would argue, are not *per se* essential characteristics of area studies but constitute assets of individual researchers or methods of choice - they are necessary only as far as the specific research topic requires it.

2.2 Comparative Area Studies

While area specialists usually focus on individual countries, parts of a given world region or inter-regional linkages, individual or groups of scholars also engage in comparative research. Where profound area knowledge of one or more areas is combined with methods

Table 1 Three Types of Comparative Area Studies

	Intra-regional comparison	Inter-regional comparison	Cross-regional comparison
Object of comparison	Comparing entities within areas	Comparing different areas as analytical units/entities	Comparing entities from different areas
Example	Political parties in Southern Africa	Regional co-operation in Asia and Latin America	Resource-rich countries in Africa, Latin America, and the Middle East

Source: Authors' compilation.

[4] In Germany, three distinct strands of area studies can be discerned, viz. (1) a classical or philological strand focusing on the specifics of the language, literature, arts, and (pre-modern) history of a given region, (2) a social science strand including political science plus some branches of economics, sociology, and human geography, and (3) a cultural studies strand bringing together some of the region-oriented work in sociology, ethnology, anthropology, the humanities, and newer interdisciplinary study clusters such as gender studies, film and media studies, ethnic studies, etc. (cf. Eckert 2005: 46–47; Puhle 2005; Wissenschaftsrat 2006: 9). While these three strands can intersect with respect to individual areas (e.g. under the roof of an area-studies association), often scholars within the various strands tend, for career or other reasons, to be more concerned with their colleagues and the ongoing work in the respective disciplines.

of comparison across nations or other empirical entities, or other empirical entities,[5] we can speak of comparative area studies. Although the term 'comparative area studies' is used by a few academic institutions in the United States and elsewhere, there seems to be no established definition of the term. It may be said that comparative area studies do not (yet) exist as a proper field of academic research. They are rather a 'new kid on the block'.

Basically we can think of three types of comparative area studies (see also table 1). First, there are *intra-regional comparisons*. Within the context of such research, aspects or phenomena of different geographical entities within a given region are compared, e.g. labour movements and their links to political regimes in Latin America (Collier and Collier 1991) or electoral systems in post-Soviet Central Asia (Jones Luong 2002). Intra-regional comparison is probably the most well-known and most widely spread type of comparative area studies. This is no coincidence and reflects, *inter alia*, the fact that research agendas and analytical concepts tend to be relatively homogeneous when it comes to individual world regions. Moreover, area specialists working on a given region tend to be more familiar with each other and more willing to engage in collaborative projects.

Inter-regional comparisons, a second type of comparative area studies, are still fairly rare (cf. Mainwaring and Pérez-Liñán 2007: 202). The focus of such research is usually on broad or transformational processes which affect different world regions. Classical examples of such processes include democratisation (O'Donnell et al. 1986), industrialisation (Gereffi and Wyman 1990), or the rise of nationalism (Anderson 1983). The idea behind such projects is to identify regional patterns and to compare them with each other. If distinct regional patterns exist, the question may change into why and in what specific ways regions in different parts of the world react to similar stimuli. Alternatively, the research might zoom in on the linkages between more or less simultaneous processes taking place at different levels of analysis, such as globalisation and regionalisation in more recent times. Indeed, since the 1990's we have witnessed a new wave of academic work on regionalisation and regionalism (e.g. Mols 1998; see also Breslin et al. 2002 for an overview). While some of this work has analysed the dynamics of such phenomena within a given region (e.g. Pempel 2005; Katzenstein and Shiraishi 2006), there have also been comparative projects focussing on the similarities and differences within the overall regionalisation trend (e.g. Katzenstein 2005).

Another recent stream of research has looked into inter-regional differences of democratisation, e.g. in terms of timing and sequencing or relative 'democracy averseness'. Such research has led to a greater understanding of which explanations of democratisation are truly universal and which are bounded by regional or historical demarcations (cf. Bunce 2000; Mainwaring and Pérez-Liñán 2007: 201). Findings about regional differences in democratisation in turn have led to more sophistication with regard to disentangling the factors behind such differences. As regions *per se* cannot cause the differences (Bunce 2000: 721), recent research has focused on the specific mechanisms underlying the diffusion and dissemination of regime types to explain why regions can exhibit distinct patterns of democratisation (Stokes 2004;

[5] The suitability of applying abstract concepts of, for instance, Western origin to other contexts certainly also constitutes some sort of comparison. However, comparing an abstract model and an empirical entity is not considered to be a comparison in the narrow sense.

Mainwaring and Pérez-Liñán 2007: 223–226). Such research projects demonstrate how inter-regional comparison (often of a quantitative kind) can be usefully combined with region-specific research involving process-tracing and other methods.

A third type of comparative area studies is *cross-regional comparison*. Cross-regional studies involve the comparison of analytical units across different regions, e.g. the role of the state in economic development in Korea, Brazil, India, and Nigeria (Kohli 2004). While comparative research involving cases from among the advanced industrial countries is by now fairly common - at least in comparative politics - comparative research integrating the 'non-Western world' still constitutes the exception to the rule. This is no coincidence as 'cross-regional comparisons are inordinately expensive and difficult to do with accuracy. Where accurate observations depend on a deep contextual knowledge of the nations at hand, even acquisition of the requisite language skills can be a daunting task.' (Hall and Tarrow 1998) In spite of such difficulties it is worthwhile to pursue cross-regional comparisons as they permit to test the universal character of theories and concepts developed within the disciplines and within area studies. Certainly there is no methodological reason for *not* using cases from more than one region when case selection focuses on similarity of the dependent or independent variables (Mainwaring and Pérez-Liñán 2007: 203). If we want to know whether a certain concept can really 'travel' or whether a theory is geographically bounded, we have to engage in cross-regional comparison. We will say more about the benefits of comparative area studies in the following section.

3. Area and Comparative Area Studies: The Why and How

Area and comparative area studies (ACAS) do not constitute ends in themselves. They must serve a purpose. This is not to deny that area-studies research can and indeed should be pursued for the sake of accumulating knowledge about particular objects of interest. In our understanding, the accumulation of knowledge about actors, structures and processes, political, economic, social and cultural phenomena and manifestations in various parts of the globe constitutes a legitimate and potentially fruitful scientific enterprise. In particular, proper descriptions infused by in-depth knowledge of local specifics can not only advance our understanding of particular cases but can also provide the basis for explanations beyond the case in point.[6] Indeed, such descriptions - which tend to be undervalued by social scientists whose understanding of science is restricted to the accumulation of theory - are vital stepping stones for deriving concepts that can travel and for developing comprehensive theoretical and analytical frameworks (see also section 5 below). Moreover, the description of phenomena in other contexts does not only serve a better understanding of the former but also helps to under-

[6] By 'proper descriptions' we do not refer to matter-of-fact descriptions such as 'X did that and that then and then' but, echoing Gerring (2006), to descriptive statements (or inferences) that are aimed at characterising or classifying, that present overviews of temporally ordered series of events (chronologies) or periodisations of phenomena, that are of an associative kind or try to synthesise empirical findings into some kind of generalisation.

stand one's 'own' context. As Sartori argues (1994: 16), 'he who knows only one country only knows none'.

In more general terms it can be suggested that the world would be a poorer place if only utility-oriented research was permitted or supported. Nevertheless we would argue that social science based ACAS should aim at more than just '*l'art pour l'art*'. To begin with, we consider it vital that ACAS engage closely with the relevant disciplines. They should do so a) in order to advance the knowledge base of these disciplines and b) to benefit from analytical advances of the disciplines.[7]

Of course, the rationale of area studies can no longer be - as used to be the case in the United States after World War II - to complement the social sciences so that in conjunction the two would lead to some kind of universal social science (cf. Mitchell 2003: 8, 23–24). The increasing fragmentation of both the social sciences and area studies has made the achievement of such an aim illusionary. As long as the social sciences tried, with respect to their own thematic 'areas' (the state, the society, the economy etc.), to develop theories that would cover the globe, area studies could hope to play some integrating role. Now that a number of scholars have restricted their quest for scientific credentials to emphasising their respective methodological rigour, formerly existing links with area studies have tended to weaken (cf. Mitchell 2003: 16–20).[8]

Still, some of the original ideas with regard to the relationship between the disciplines and area studies have not lost their attraction. Productive tensions between the two continue to exist. Thus, both area studies and comparative area studies can help to 'cleanse social theory of its provincialism' (Mitchell 2003: 8). In other words, ACAS can be used to challenge or better: to revise and refine theoretical propositions based on empirical facts and normative ideas derived from European and North American experience.

Challenging established wisdom is one thing, generating scientific knowledge by means of developing general propositions another. Needless to say that scholars interested in generalisations on the one hand have to pay attention to area-specific information if they want to understand the scope of these generalisations.[9] On the other hand, comparative area studies can also play an important role in terms of expanding the knowledge base of the social sciences. As Huber (2003: 1) notes, cross-regional comparisons can help

(1) to increase confidence in the usefulness of existing concepts and theories if similar processes can be found in widely different contexts,
(2) to modify concepts and better specify theories with regard to contextual variables, and
(3) to highlight the existence of different paths which lead to the same outcome and thus the need to develop new theory.

[7] As Szanton (2003) put it: 'Area Studies needs these disciplines for the concepts and methods they can contribute to understanding and translating another society or culture.'

[8] While this trend is particularly pronounced in economics, is does apply to a lesser extent to comparative politics, the mainstay of area studies within political science. Witness, for example, the continuing strong area-studies bend and methodological pluralism visible in major comparative politics journals (Munck and Snyder 2007). See, however, also Mahoney (2007).

[9] Most generalisations hold only within delimited contexts. This is even true for many areas in the natural sciences. See Eidlin (2006) for a more in-depth discussion of this point.

Area studies can also introduce new ideas to the disciplines as witnessed by the 'academic career' of concepts such as the 'developmental state', 'critical junctures' or 'remittances'. By means of the analysis of the causes and effects of pertinent phenomena across regions, comparative area studies can play an important role in terms of generating generalisations applicable to broader settings and in terms of generating the kind of middle-range theory that is context-sensitive but yet manages to capture important causal effects.[10] While local, national, and regional trajectories and outcomes with respect to a certain phenomenon may differ, the underlying mechanisms and processes can still be similar. Comparative area studies, conducted systematically, can help to uncover these mechanisms and processes.

The utility of ACAS is not limited to the 'ivory tower'. Area specialists can provide decision-makers with indispensable contextual knowledge needed for foreign-policy formulation and implementation as well as for development co-operation.[11] The challenges of applied sciences - to make practical recommendations readily available - are not necessarily at the expense of scientific excellence. Undoubtedly, the strong desire of decision-makers for blueprints tempts scientists to deliver wide-ranging recommendations which are not grounded in the state of the art. Yet, methodological and theoretical rigour is the basis for fully understanding the causes and effects of social, political or economic phenomena in areas 'Westerners' are commonly not familiar with. Practical recommendations without such a basis may even border on charlatanism.

Table 2 Functions of Area and Comparative Area Studies

Description	**Concepts**	**Theory**	**Practical recommendations for decision-makers**
Learning more about 'other' areas	Testing whether concepts can 'travel' to areas/countries	Challenging causal claims derived from other regions	Providing descriptive information on pertinent issues in specific areas
Learning more about the area of origin and/or interest by way of comparing	Refining/adjusting concepts	Refining causal claims by adding contextual conditions	Providing descriptive information on general prevalence of phenomena across areas
Identifying general commonalities and differences across areas	Developing new concepts	Developing new causal claims (e.g. by identifying alternative paths to a given outcome)	Providing theory on causal relationships for designing policies toward areas

Source: Authors' compilation.

[10] Following Merton (1968), middle-range theories can be defined as 'theories that lie between the minor but necessary working hypotheses that evolve in abundance during day-to-day research and the all-inclusive systematic efforts to develop a unified theory that will explain all the observed uniformities of social behaviour, social organization and social change'.

[11] For a recent discussion of the relevance of comparative politics (and thus comparative area studies applied to the study of politics) for public life see APSA-CP (2003). The requirements for academics wanting to influence policy-making processes are discussed in some detail in *Asia Policy* (2006).

In short, the rationale and merits of ACAS are hardly restricted to 'learning about the other'. Possibly far from being exhaustive, table 2 indicates that ACAS help fulfil four functions: description, conceptualisation and theory-building as well as developing practical recommendations for policy-makers. While it is probably fair to say that a good deal of the work undertaken in area studies is aimed at 'understanding' the object of research, comparative area studies is usually aimed at 'explaining'.[12] As soon as the scholar is looking for generalisations, it may be comparative area studies rather than area studies that are called for.

4. Methodological Challenges for Comparative Area Studies

Methodological sophistication is a prerequisite for fully exploiting the potential of ACAS. However, a comprehensive list of methodological challenges facing ACAS is clearly beyond the scope of this paper - and this even holds true if we restrict our considerations to the study of politics. Hence, we will focus in the following paragraphs on two main challenges typical of the three types of comparative area studies identified above,[13] though they apply to area studies (and thus disciplines other than political science) as well.

The most compelling challenge involves the use of concepts and the choice of adequate (comparative) research strategies. In both terms, the different types of comparative area studies also face different challenges. Whereas intra-regional comparison often deals with relatively homogeneous context conditions, inter-regional comparison and cross-regional comparison are confronted with the problems associated with apparently highly heterogeneous context conditions. The comparison of phenomena in heterogeneous context conditions is fairly unproblematic with respect to descriptive purposes. Comparisons aiming at identifying causal relationship, however, face more difficulties. Particularly, for such purposes any comparative undertaking requires carefully composed research designs.

4.1 Concepts

Clear-cut concepts of the phenomena under investigation are indispensable for any study - even a case study - but, as Dogan and Pelassy (1990) have argued, carefully designed concepts are of utmost importance to comparative studies. Concepts in comparative studies must be examples of a similar phenomenon in order to allow for 'comparability' (Gerring and Thomas 2005: 3) and, hence, be applicable to all cases. Particularly when we embark on cross-regional comparison this is often at the expense of the precision of the concept. According to Sartori (1994) we have to climb the 'ladder of abstraction' to capture all the phenomena we want to study. If, for example, we want to compare states we will quickly encounter difficulties when trying to include all the characteristics we

[12] This basic difference reflects the strong hermeneutical tradition in the strands of area studies that are informed by the humanities and the emphasis on causal inferences in much of the social science-based area studies. For a concise discussion of these two basic approaches see Hollis and Smith (1990).

[13] Another methodological challenge for ACAS, not discussed here, concerns the organisation of interdisciplinary research. As Moran (2006: 73) puts it, we are confronted with the 'apparent paradox that interdisciplinarity is simultaneously hugely popular but unable to make serious headway'. The interested reader is referred to the discussion in Basedau and Köllner (2006: 26 – 28).

know from the Weberian conception of a state (such as the monopoly on the use of force, administrative structures covering the whole territory, and so forth). The debate on failed and failing states reminds us that some of the entities presumed to be states might in fact be something else. A comparison can result in the precise *description* of differences or shortcomings (as well as a more conscious understanding of the state in Europe and North America) but we cannot equate these failed states with 'proper' states, e.g. with respect to the *causes or effects* of their tax-raising capability, falsely assuming that they belong to the class of states in the Weberian sense. We would need a wider, less inclusive concept of the state.

Yet, the design of concepts is fraught with pitfalls. Sartori (1994) has highlighted four conceptual ways of 'miscomparing'. Among these, parochialism and misclassification can often be found in area studies. Parochialism refers to concepts which are developed without consulting previous work on the issue in question. As a result, concepts may apply different labels to very similar or identical phenomena or similar labels to different phenomena. Particularly, partly overlapping but not identical concepts render comparison difficult, at times impossible or even misleading.[14] Consider the notion of 'caudillismo' or the 'big man' phenomenon. Both phenomena have been studied in different regional contexts (Latin America and Africa, respectively) and refer to the prevalence of powerful individuals and how they manage to stay in power. Related overlapping concepts are 'neo-patrimonalism' or 'sultanism', though they tend to involve much more than the relations between patrons and clients (cf. Erdmann and Engel 2007; Chehabi and Linz 1998). The cross-regional comparison of the role of powerful individuals in political systems would be highly fruitful but different labels have thus far hindered such a study. Parochialism can result in misclassification when the same label describes very different phenomena. Subsuming dominant parties (such as in Japan or South Africa) and parties in one-party systems (such as in Cuba or Vietnam) under the label of one-party states will be highly misleading given that the former operate in a fairly competitive setting whilst in the latter case the regime outlaws any form of multi-partyism.

Finally, conceptual problems arise due to different notions of the concept among the citizens as well as social, economic and political actors in the regions to be studied. Ongoing disputes and competing interpretations of key concepts in political and related social sciences such as 'democracy', 'social justice', 'development', 'globalisation' or 'security' derive from their normative or affective connotation.[15] Few will disagree with the label of the bottle as such, but how the wine should taste, can be highly controversial. A Middle East notion of democracy might require a rule of god's will rather than free and fair elections (as a student in one of the authors' classes claimed). Social justice can mean equality in terms of opportunities or outcomes (which are far from being the same), but traditional notions might justify the discrimination of women or the existence of 'natural slaves' (Aristotle). The comparison of differences in this regard is certainly fruitful or even necessary but if we want to go beyond systematic description and find out about

[14] For useful discussions of conceptual stretching see also Collier and Mahon (1993), Collier and Levitsky (1997), Goertz (2006: chapter 3).

[15] Collier et al. (2006) provide a coherent discussion of contested concepts in the social sciences, focussing on W. B. Gallie's seminal contribution to the debate on this issue.

effects or causes we have to agree on one single concept.[16] To sum up, concepts are crucial and there can be no meaningful comparison, especially in comparative area studies, without a careful and sensitive drafting of concepts.[17]

4.2 Research Strategies

The choice of research strategies is another crucial methodological aspect for comparative area studies. Heterogeneous or homogeneous context conditions have consequences for the choice and design of research strategies or, more precisely, comparative strategies. Especially, diverging contexts intensify a key problem in the social sciences when we aim at identifying causal relationships. Single causes rarely exist, if at all, in social science. Instead we deal with dynamic and complex causal mechanisms and we never know completely which variables influence the phenomenon under investigation. Even if we have established a relationship, we can never be sure whether other variables, not controlled for or poorly operationalised, would substantially modify our explanation or indeed render it spurious. Different research strategies have different potentials for tackling this problem. The number of cases and variables to be studied, their selection and the relevant 'real-world' conditions vastly influence the applicability of a research strategy. The latter aspect is maybe the most important, affecting the choice of research strategies in comparative area studies.

Experiments have a great potential to isolate crucial relationships because the scholar can systematically control and modify the surrounding conditions. However, states, cultures and economies cannot be taken to the laboratory, and, hence, experiments are seldom usable in political science (Lijphart 1975).[18]

Single-case studies do not face the problem of inapplicability, but they necessarly fall short of providing a sufficient basis for generalisation, let alone cross-regional comparison. Thus, as a tool to promote comparative area studies they are widely inaccurate. At best, the case might be chosen due to its exceptional status (such as Botswana in terms of good governance in sub-Saharan Africa). They may constitute 'deviant', 'hard', 'special' or 'extreme cases' (see Eckstein 1975; Gerring 2007: 101–108).[19] For selecting a particular case, however, another comparative study or at least a comparative perspective is a pre-condition.[20]

Two principal research strategies have traditionally been advised for 'controlled' comparisons across nations. A quantitative cross-country analysis ('large N') and the more qualitative comparative method (mostly 'small N') (Nohlen 2004; Lijphart 1975). It is subject to debate whether the quantitative approach pursued in cross-country analyses forms part of the comparative method (King et al. 1994; Liijphart 1975). Although a 'large-N'

[16] Scholars can define their concepts unilaterally. Even if we do not object to a possibly ethno-centrist 'export' of concepts we must find out how local people (or interview partners for that matter) think about the phenomenon (or label) in question before jumping to conclusions about causes and effects.

[17] For a useful discussion of the criteria relevant to concept formation see Gerring (2001: chapter 3).

[18] On applications of 'natural experiments', which are gaining in popularity in economics but also in political science research, see Dunning (2007).

[19] More generally, on the analytical merits of case studies see Gerring (2004).

[20] For an overview of sophisticated case-selection techniques see Gerring and Seawright (2007).

study involves comparison, the selection of cases and the use of data diverge from small-N studies. Quantitatively oriented scholars are keen to maximise the number of cases and to process the data statistically whereas the small-N comparativist chooses his/her few cases according to pertinent criteria and is free to use qualitative or quantitative data. The statistical approach is geared towards generalising both in terms of description and correlations, and comparative area studies should not ignore this tool - though the classical cross-country analysis is certainly not a defining feature of comparative area studies. However, statistical approaches paint with a rough brush given that exceptions tend to be neglected once a significant relationship has been established. Exact mechanisms of causation are hard to detect on the basis of statistical data alone. In addition, the need to process the data statistically requires exact and reliable data which frequently are not available - in particular in many non-European regions - and the use of proxies may result in a questionable reliability and validity of the research results ('garbage in, garbage out'). Generally, one may agree with Albert Einstein: 'Not everything that can be counted counts, and not everything that counts can be counted.' (cited in Gerring and Thomas 2005: 1)

Small-N (and partly medium-N) comparisons avoid the rough-brush approach since they entail in-depth study of the cases under investigation. If cases are carefully selected, they have a great potential to isolate crucial relationships. Their main challenge remains however that it may prove difficult to identify a sample that meets such criteria.

In theoretical terms, the most promising strategy is the so-called most-similar-systems strategy (Przeworksi and Teune 1970). It derives its logic from the method of difference[21] developed by John Stuart Mill and comes close to a natural experiment.

Cases are selected on the basis of a large number of similarities and pertinent differences with regard to the variables between which a relationship is hypothesized. The similarities can be regarded an approximate *ceteris paribus* clause and can be excluded to explain the differences, thus we can be relatively sure that the link is caused by other variables. The results even offer potential for generalisation since we can claim that, under the conditions given in the sample, we can observe a certain link between the variables investigated. The main challenge for applying the most-similar-systems design, however, is to find suitable circumstances in the real world, especially when comparing across different regions. The more variables we consider to be relevant, the more difficult it is to find cases that are sufficiently similar but differ in one or two aspects.

Hence, at first glance, the most-similar-systems design seems ineligible for cross-regional studies and inter-regional studies. However, intra-area comparison may offer the opportunity to apply the most-similar-systems design (Nohlen 2004). Areas or regions are often defined as such because of a number of similarities they share. Thus, entities within such an area might be used to apply an approximate most-similar-systems design or a strategy of 'comparable cases' (Lijphart 1975), as long as they show differences with regard to our operational variables. Being part of an area, on the other hand, constitutes by no means proof of similarity in relevant context conditions. Some of the commonalities may be of less importance to the research topic - for instance a shared language and geographical proximity - and at closer inspection we encounter many differences.

[21] One should not be confused by the apparently contradictory terminology. The 'difference' in Mill's term refers to the operational variables whilst Przeworski and Teune's term refers to the similarity of the surrounding conditions.

Taking into account *relevant* similarities, it is well possible to identify approximately similar systems across different regions. Albeit these cases may be rare, if we know which variables are important for a given research topic we can look for countries that share many of these characteristics but differ with regard to one crucial aspect. For instance, the regional powers in Brazil and South Africa share some pertinent commonalities with respect to their regional power resources while the communist states of Vietnam, Cuba and China have much in common in terms of their political system. We do not suggest that these cases constitute actual most-similar systems, but the fact remains that it is possible to find relevant cases across regions.

However, the most obvious research strategy for comparative area studies, particularly cross-regional comparison, seems to be the most-different-systems design. It tries to tackle the problem of causality by choosing cases that have something special in common although the whole context is decisively different. If additional commonalities can be identified it is likely that these constitute the causes for the other phenomenon the cases share. Assuming that our areas form such heterogeneous contexts we can search for specific commonalities.

Yet, this strategy is second best at isolating causal relationships because we never know whether the phenomena identified in our cases are not also present in other cases where the assumed effect is not present (Geddes 1990). Moreover, the problem of 'equifinality' further reduces the explanatory power of the approach: the very same phenomenon can have different causes. One-party dominance might be due to electoral fraud, a strong social base of the party in question or a favourable set of institutions. A state can become a pariah state by intention or by default. Civil wars can be caused by greed but also by grievance. Economic growth can be the result of natural resource windfalls or well-designed policies. It is therefore indispensable to study additional control cases that might resemble one or more of the cases but do not show the specific trait in question. It is also useful to employ a diachronic perspective to study why in some cases one-party dominance ended or why the pariah-state status was lifted.

Generally speaking, comparative strategies should be adjusted to the requirements of the different types of comparative area studies. An overview of the most obvious options is given in table 3. However, it is not so much the empirical situation but our imagination that marks the boundaries of opportunity. Generally, different research strategies should

Table 3 Research Strategies for Comparative Area Studies

	Intra-regional comparison	Inter-regional comparison	Cross-regional comparison	
Surrounding conditions	Relatively homogeneous	Heterogeneous	Mostly heterogeneous	
Availability of cases	Small to medium N	Small N	Large N	Small to medium N
Comparative strategy of choice	Most-similar-systems design	Explorative comparison & Most-different- systems design	Cross-country analysis	Most-different-systems design (+ control cases)

Source: Authors' compilation.

be considered and we can use more than just the large-N and small-N strategies. For example, small and medium-N studies can make use of algebra-based methods which understand cases as configurations of variables and take into account causal heterogeneity ('Qualitative Comparative Analysis'; 'fuzzy sets', cf. Ragin 1987, 2000). The comparison of a small number of cases may also build on process-tracing applied to the different cases in question (George and Bennett 2005; Gerring 2007: chapter 7), and we should not ignore the recent lively debate on 'triangulation', i.e. the combination of different (often qualitative and quantitative) methods.[22] It has been said that to a hammer every problem is a nail (Watzlawick 1993). We should be able to use the whole toolbox.

5. Summary

After the end of the Cold War, a number of developments have had a stimulating effect on ACAS in general and ACAS research on politics in particular. These developments include the end of the (as we now know: non-teleological) third wave of democratisation, the rise of China and India, and new global threats, particularly the spread of weapons of mass destruction and trans-national terrorism. At the same time, in the 1990's area studies faced a number of criticisms regarding the alleged lack of 'disciplinary' methodological and theoretical rigour as well as the use of 'ethno-centrist' or late-colonial concepts and perspectives. Also, doubts were raised as to whether there was still a need for area studies in an age of globalisation. More recently - particularly in the wake of 9/11 - criticism levelled at area studies has subsided to some degree but the general debate on the future course of area studies and its links with the disciplines is bound to continue.

While there are many definitions of area studies, their distinct characteristic remains their specific geographical focus. Based on detailed analysis of local phenomena, area studies can help to challenge, test, refine, and develop both local and universalistic concepts and theories - regardless of their disciplinary background and the particular methods involved. Comparative area studies, a so far neglected 'cousin' of area studies, share the same traits but combine in-depth knowledge of one or several areas with comparative methods. Three different types of such studies can be identified: (1) Intra-regional comparison which refers to comparative studies within areas; (2) inter-regional-comparison which puts whole areas as entities in a comparative perspective; and (3) cross-regional comparison which selects empirical entities from different world areas.

ACAS are not ends in themselves but can greatly contribute to systematic descriptions of political and other phenomena - in terms of learning more about both 'other' and 'own' regions - as well as testing and modifying concepts and universalistic theory. As a consequence, they can provide a sound scientific basis for decision-makers. Yet, area studies and even more so comparative area studies face a number of methodological challenges, the most compelling of which concern the use of concepts and the choice of adequate research strategies. Methodological rigour is required, particularly when scholars aim at identifying causal relationships in heterogeneous context conditions that are typical of comparative studies across regions. While a common understanding of phenomena is

[22] See e.g. Coppedge 2002, Brady and Collier 2004, Lieberman 2005, Creswell and Clark 2007, and *Qualitative Methods* 2007.

indispensable for the drafting of concepts, pluralism in the choice of research strategies can help to compensate the shortcomings of single strategies.

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