Comparing, Casing and Generalizing: Traditional Designs and Innovative Approaches

3rd Term, Academic Year 2023-2024

Instructor: Erica Simmons, University of Wisconsin–Madison

Organizers: Ophelia Nicole-Berva, Juliette Saetre, Zuzanna Samson, Nora Söderberg

Credits: 10

Sponsoring professor: Jeffrey Checkel

Contact: Pia Dittmar

Dates, Times, and Rooms:

Monday 13 May 2024: 10:00-12:00, 13:00-16:30 (Seminar room 2, Badia Fiesolana)
Tuesday 14 May 2024: 9:30-13:00, 14:30-18:00 (Seminar room 4, Badia Fiesolana)

Overview

This workshop delves into three of the fundamental elements of social scientific research: case selection, case comparison and generalization. More specifically, it focuses on and proposes to collectively rethink comparative research designs. While comparative research designs, particularly controlled comparisons, have consistently served as foundational pillars in political science, they are not always optimal for understanding political processes and outcomes. In this workshop, we invite Erica Simmons, whose co-edited volume *Re-thinking Comparison* provides the foundation for our discussion, to collectively reflect on why, when and what we should compare, and ask: could we do otherwise?

The workshop will take place over two days and is a balanced mix of lectures, discussions on selected readings, and hands-on exercises focused on the participants' own research designs. We also invite SPS professors and department members to join us for an introductory round table on comparison on the first day. The remainder of the workshop will be divided into three main themes (casing, comparing, and generalizing). Participants will be required to read the assigned readings and write a brief (2-page) summary of their research projects in advance, to be able to workshop their own research based on the discussions in the workshop.

Our aim is to encourage reflection and to learn across methodological or epistemological divides, and we, therefore, invite PhD researchers from all years and disciplinary backgrounds to attend and take part in the discussions.

Indicative Program

13 May: Casing

10:00 – 12:00 – Opening round table

The workshop will start with a roundtable with Erica Simmons and professors of the SPS department, who will be invited to share their thoughts on a set of questions. They will serve to open a broader discussion on the topics covered in the workshop. Possible questions may include:

1. What drives our need to compare in social science research? Are there other ways to arrive at similar conclusions?

2. How useful is the concept of a discrete "case" in a world characterized by interconnectedness? How do we define the contours of our "cases"?

3. Should generalization be an inherent objective in social sciences?

12:00 –   13:00 Lunch break

13:00 – 14:30 – Case selection (Erica Simmons)

The afternoon session will focus on cases and casing. Erica Simmons will introduce the topic (30 minutes), and we will then discuss the readings assigned. The session will discuss the fundamental nature of a case, how to select cases and how to delimit them, and explore and rethink why the traditional case comparison method is often favored.

Mandatory readings:

Simmons, Erica S., and Nicholas Rush Smith, eds. 2021. *Rethinking Comparison: Innovative Methods for Qualitative Political Inquiry*. 1st ed. Cambridge University Press.

Chapter by Joe Soss, "On Casing a Study versus Studying a Case." Pp. 84–106.

Chapter by Thea Riofrancos, "From Cases to Sites: Studying Global Processes in Comparative Politics." Pp. 107–26.

Recommended reading:

Small, Mario Luis. 2009. "'How Many Cases Do I Need?': On Science and the Logic of Case Selection in Field-Based Research." *Ethnography* 10(1):5–38.

15:00 – 16:30 – Casing in practice (Facilitation: Erica, Ophelia and Zuzanna)

In this session, workshop participants will introduce their thesis projects and present how they approach case selection in their own research. Based on the previous session, participants are invited to discuss their own research designs in groups of three or four based on questions such as the following:

What is your study a case of? Which cases have been selected, and for what reasons? What other cases would be interesting for this research? What other reasons can we think of to justify the cases? Are your cases composed of countries, or are they research locations and field sites? Do we need cases to be "bounded"?

After the small group discussion, we will meet for about 30 minutes for a plenary discussion so that everyone can provide feedback on the exercise.

14 May: Comparing and generalizing

9:30 – 11:00 – Comparing (Erica Simmons)

The second day starts with a lecture on comparison, departing from the traditional controlled case comparison to explore alternative ways of comparing. We discuss the assumption behind these modes and discuss the readings.

Mandatory readings:

Simmons, Erica S., and Nicholas Rush Smith, eds. 2021. *Rethinking Comparison: Innovative Methods for Qualitative Political Inquiry*. 1st ed. Cambridge University Press.

Chapter by Jillian Schwedler, "Against Methodological Nationalism: Seeing Comparisons as Encompassing through the Arab Uprisings", pp. 172-189.

Chapter by Mala Htun and Francesca Jensenius, "Comparative Analysis for Theory Development", pp. 190-207.

Simmons, Erica S., and Nicholas Rush Smith. "Comparison with an Ethnographic Sensibility" (with Nicholas Rush Smith). *PS: Political Science and Politics* 50:1 (January 2017), pp. 26-30.

Recommended reading:

> Bartlett, Lesley, and Frances Vavrus. 2017. "Comparative Case Studies: An Innovative Approach." *Nordic Journal of Comparative and International Education (NJCIE)* 1(1).

11:30 – 13:00 – Comparing in practice (Facilitation: Erica, Nora and Juliette)

In the same vein as day 1, participants are invited to use their own research to think about comparison, in both traditional and more "innovative" manners. What does the research compare? How is the comparison done in practice? Could there be another way to do it? What does the comparison serve? We will keep about 30 minutes in plenary so that everyone can provide feedback on the exercise.

13:00 – 14:30 Lunch break

14:30 – 16:00 – Generalization (Erica Simmons)

For the final lecture, Erica Simmons will share some insights about generalization: what do we do when we generalize? How do we do it, and what for? Based on assigned readings, we will debate and discuss the different ways social scientists can generalize from their localized findings.

Mandatory readings: TBA

16:30 – 18:00 – Generalizing in practice (Facilitation: Erica, Juliette and Ophelia)

In this final practical session, we invite participants to work in small groups and focus on one project only. Groups are asked to imagine what the result of this project can be: what generalization could it reach? How does it talk to broader theory? Groups will present the results of their discussion by pitching the project as a book.

18:00 – Aperitivo in San Domenico (TBC)

Additional readings:

Bartlett, Lesley, and Frances Vavrus. 2016. *Rethinking Case Study Research*. Routledge.

Candea, Matei. 2007. "Arbitrary Locations: In Defense of the Bounded Field-Site." *Journal of the Royal Anthropological Institute* 13(1):167–84.

Cheeseman, Nick. 2021. "Unbound Comparison." Pp. 64–83 in *Rethinking Comparison*, edited by E. S. Simmons and N. Rush Smith. Cambridge University Press.

Geddes, Barbara. 1990. "How the Cases You Choose Affect the Answers You Get: Selection Bias in Comparative Politics." *Political Analysis* 2:131–50.

Gerring, J. 2016. *Case Study Research: Principles and Practices* (2nd ed.) (chapter 3 on case selection)

Schaffer, Frederic Charles. 2021. "Two Ways to Compare." Pp. 47–63 in *Rethinking Comparison*, edited by E. S. Simmons and N. Rush Smith. Cambridge University Press.

Seigel, Micol. 2005. "Beyond Compare: Comparative Method after the Transnational Turn." *Radical History Review* Issue 91:62–90.

Simmons, Erica S., and Nicholas Rush Smith. 2019. "The Case for Comparative Ethnography." *Comparative Politics* 51(3):341–59.