

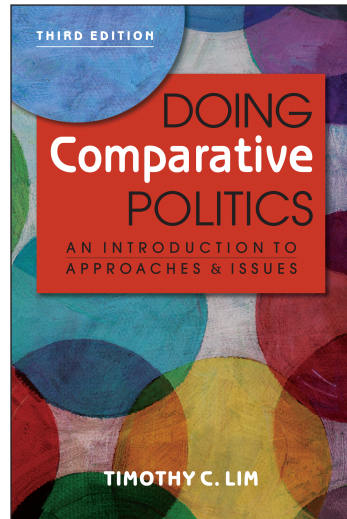
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Doing  
Comparative  
Politics:  
An Introduction to  
Approaches and Issues

THIRD EDITION

Timothy C. Lim

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# Getting Into Comparative Politics

Scholars who study comparative politics, and all scholars for that matter, are generally concerned with answering questions, or with providing explanations for the myriad processes, issues, and events that shape the world in which we live. Of course, answering questions first requires that we *ask* questions. In the field of comparative politics, these questions have generally revolved around large-scale political, social, and economic changes that occur primarily at the domestic or national level. Examples of such large-scale change include social revolutions (e.g., the French Revolution of 1789, the Russian Revolution of 1917, or the Chinese Revolution of 1949), nation-building, economic transformation and development (e.g., the shift from a rural economy to a capitalist-industrial economy), political development (especially democratization), among others. The foregoing list of issues leads to fairly obvious, albeit broad, questions: Why do social revolutions occur, and why are some successful, while others are not? Why did some countries industrialize long ago, while many other countries only began to industrialize fairly recently? Why have some countries democratized, while others remain decidedly nondemocratic? Part of “getting into comparative politics” means asking the sorts of questions around which the field revolves.

Given the importance of questions, it would be useful to introduce a few more, some big and some not so big; some very clearly part of the domain of comparative politics, and some perhaps much less so:

- Why does the United States lead the rest of the industrialized world—by a very wide margin—in the number of gun homicides?
- Why are there still so many desperately poor peoples and desperately poor countries in the world? Conversely, how have some peoples and countries been able to become rich and prosperous in only a generation or so?

## 2 *Doing Comparative Politics*

- Why do some mass protests against violent and repressive governments work while others fail miserably?
- Why do high school students in the United States—in the richest country on the planet—do relatively poorly on international tests of math and science?

The foregoing list is purposely bookended by two questions not normally asked in the field of comparative politics, in that they are both centered on the United States and are both about “smaller” (albeit far from unimportant) issues. I do this for one simple reason: to highlight the fact that the field of comparative politics, in principle, can cover a very diverse range of issues and is not limited to the study of foreign countries. I will discuss both these points later in the chapter. First, however, I want to say something about the issue of “answers,” for finding answers is also a part—a very big part—of getting into comparative politics. For all the questions just posed, there are many possible answers. Some answers may seem very persuasive, and others may seem completely unconvincing. On the question about gun homicides, for example, controversial director Michael Moore argued in his Oscar-winning 2002 film *Bowling for Columbine* that the high level of gun violence in the United States is largely due to a “culture of fear.” This culture of fear, he posited, is constantly reproduced through policies and practices that exacerbate insecurity throughout US society; more important, it pushes Americans to resolve problems and interpersonal conflict through violence, a reaction that in turn creates a self-confirming cycle: fear begets violence, which begets more fear, which begets even more violence, and so on. A culture of fear may not explain everything we need to know about gun violence in the United States, but according to Moore, it is almost certainly a major element—perhaps *the* major element—of any explanation that purports to tell us why Americans are so prone to shooting each other. Is Moore right? Or is his argument completely baseless? *How do we know?* More broadly, how do we know if *any* argument—especially one that deals with complex social, political, or economic phenomena—is valid or even plausible? This book is designed, in part, to help you answer these sorts of questions. Learning how to evaluate specific arguments, however, is secondary to the overarching goal of this book, which is to enable you to better understand and explain social, political, or economic processes, events, and outcomes *on your own*.

So what does any of this have to do with comparative politics? The answer is this: comparative politics provides us with a ready array of conceptual and analytical tools that we can use to address and answer a wide range of questions about the social world, including the question “Why are there so many gun homicides in the United States?” Put another way, comparative politics provides a systematic, coherent, and practical way to understand and

make better sense of the things that happen in the world around us, from our own neighborhoods to the world at large. In a broader sense, moreover, comparative politics is relevant to almost anyone, even and especially to those who assume that the field is only about studying foreign countries. This is because, as a general procedure or approach, comparative politics can be applied to a huge variety of problems, from the mundane to the sublime, in a wide variety of areas. Explaining gun violence is just one example, but there are many others. Consider the following potpourri of questions and issues: Can a single-payer national healthcare system work in the United States? Are fundamentalist religious beliefs and democracy always and forever incompatible? Is vast economic inequality a necessary byproduct of a capitalist system? Will the legalization of all drugs, including the decriminalization of marijuana, significantly reduce crime and make drug use safer?

To repeat: a comparative politics approach is well suited for addressing all the foregoing questions and many others. At this point, of course, the reasons may not be clear, but they will become much clearer as we proceed. It is also important to say, at this early juncture, that comparative politics is not the only, nor is it always the best, approach one can use. Nonetheless, virtually any student or concerned citizen (not to mention scholar or policymaker) will benefit tremendously from cultivating and developing a comparative politics approach or, to put it more colloquially, from simply getting into comparative politics. With all this in mind, the next important step we need to take is to clarify what the term *comparative politics* means and what it implies. As we will see, this is easier said than done.

### What Is Comparative Politics?

Many textbooks on comparative politics provide a clear, seemingly simple answer to the question “What is comparative politics?” Perhaps the simplest is one introduced earlier: “Comparative politics is the study of politics *in foreign countries*” (Zahariadis 1997, p. 2, emphasis added). Few texts, though, stop there. Most also emphasize that comparative politics, in slightly more formal terms, involves both a *method* of study and a *subject* of study. As a method of study, comparative politics is—not surprisingly—premised on comparison or comparative analysis. As a subject of study, comparative politics focuses on **understanding** and explaining political phenomena that take place *within* a **state, society, country, or political system**. (See Figure 1.1 for a discussion of these various terms.)<sup>1</sup> This slightly more detailed definition of the field gives us a better sense of what comparative politics is and how it may differ from other fields of inquiry, although, as will be discussed later, it is a definition that can raise more questions than it answers. Still, defining comparative politics as a method of study based on comparison and a subject of study based on an examination

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of political phenomena in various countries highlights several important points. First, it immediately tells us that the field is ostensibly concerned with *internal* or domestic dynamics, which helps to distinguish comparative politics from **international relations** (IR)—a field of study largely, though not exclusively, concerned with the external relations or foreign policies of states. Second, it tells us that comparative politics is, appropriately enough, concerned with political phenomena. Third, and perhaps most important, it tells us that the field is not only characterized but also *defined* by a comparative method of analysis. I might also point out that this second definition does not automatically exclude the United States (as the first does) from the field of comparative politics: the United States is a state or country in exactly the same sense that France, Japan, India, Mexico, South Korea, Zimbabwe, or Russia is.<sup>2</sup>

As already noted, though, the second definition of comparative politics raises a number of other questions and issues. Can comparative politics, for example, focus only on what happens *inside* countries? In other words, is it possible to understand the politics of a place without understanding and accounting for the impact of external or transnational/international forces? This is a very important question, but there are several others: What is meant by *political* phenomena—or by politics more generally? Are economic, social, and cultural phenomena also political, or do they fall into a completely different category? Regarding the question of method, we might also ask: What does it mean to compare? Is comparison in comparative politics different from, say, comparison in sociology, history, chemistry, or any other field of study? Even more basically, *why* do we compare? That is, what's the point of making comparisons in the first place? And last, *how* do we compare?

### *The Importance of Definitions*

In posing so many questions, I realize that I also might have raised a question in *your* mind, namely, why make things so complicated? Isn't it possible to just be satisfied with a very short and easy-to-understand definition? The simple answer is no. One reason is clear: *definitions are important*. Very important. This is partly because they tell us what is included in the field of study and what is left out. Consider the definition suggested earlier: "Comparative politics is the study of politics in foreign countries." This definition, at least implicitly, leaves out the United States (or really any other country, depending on the nationality of the reader). But it is not clear why the United States should receive such special consideration. Is it because the United States is different from all other countries—literally incomparable? Or is there some other, less obvious reason? We are left to wonder. Consider, too, the point made in the foregoing paragraph on the notion of politics: Does a study of *politics* in foreign countries mean that we

**Figure 1.1 Some Key Concepts in Comparative Politics:  
State, Nation, Nation-State, Government, and Country**

The terms *state*, *nation*, *nation-state*, *government*, and *country* are often used interchangeably, especially in the popular press and media in general. Although this practice is not entirely unwarranted, it is important to recognize that the terms are not synonymous. A state, for example, is a legal concept that is premised on a number of conditions: a permanent population, a defined territory, and a *national* government capable of maintaining effective control over its territory. In addition, many scholars (following **Max Weber**) argue that a state must have a monopoly on the *legitimate* use of physical force or violence within a given territory. Notice that the definition of state includes a reference to government, which can be defined as the agency or apparatus through which a body exercises authority and performs its functions. In this definition, governments need not be part of a state; moreover, multiple governments may exist within a single state. We can find governments in all sorts of places—in a university or school (that is, the student government) or in **sovereign** “nations” (for example, a Native American tribal council)—and at many levels. Cities, counties, provinces, and whole regions (for example, the European Union) can also have their own separate governments.

The example of Native Americans is a useful way to differentiate a nation from a state. A nation, in the simplest terms, can be defined as a group of people who recognize each other as sharing a common identity. This common identity can be based on language, religion, culture, or a number of other *self-defined* criteria. This makes the concept of the nation inherently subjective or **intersubjective**. Nations do not require states or governments to exist, nor must nations exist within a single defined territory. One can speak, for example, of nations that transcend borders, such as the Nation of Islam. Combining the definitions of state and nation creates the concept of the nation-state. Technically speaking, a nation-state would only exist if nearly all the members of a single nation were organized in a single state, without any other distinct communities being present (Willets 1997, p. 289). From this perspective, despite its prevalent usage, many scholars argue that there are no true nation-states and that the concept should be entirely abandoned. But there are what we might call *national states*—states in which a common identity is forged around the concept of nationalism itself (for more on this issue, see Eley and Suny 1996). For example, people living in the United States may be divided by a wide range of religious, cultural, ethnic, linguistic, and other differences. Yet they all may share a common sense of “being American.” Practically speaking, the term *national state* is often used as a synonym for *nation-state*. The notion of a national state, moreover, comes close to the more concrete concept of country, which may be defined as a distinct political system of people sharing common values and occupying a relatively fixed geographic space (Eley and Suny 1996). *Country* is the most generic of the terms referred to here.

do *not* study economic, social, or cultural issues and concerns in those same foreign countries? Does it mean we only examine those things that governments or states do? If the answer to the last two questions is yes, it would necessarily mean that a lot of potentially important issues and concerns would be left out in the study of comparative politics. Yet this would clearly be a mistake.

Given the complexities of defining the field, there continue to be a variety of definitions of comparative politics. Admittedly, at least in a broad or generic sense,<sup>3</sup> most definitions of comparative politics are now on the same basic page. At the same time, there are still subtle and usually unstated differences. (For a sampling of various definitions of comparative politics, see Figure 1.2.) Thus, despite some basic consensus, it is nonetheless worthwhile to explore, in greater depth, the various aspects of how to define the field of comparative politics. For without greater exploration, a number of important, even fundamental, issues may go unquestioned. My intention, however, is not to provide *the* definition of comparative politics.

### Figure 1.2 A Few Definitions of Comparative Politics

“Comparative politics involves the systematic study and comparison of the world’s political systems. It seeks to explain differences between as well as similarities among countries. In contrast to journalistic reporting on a single country, comparative politics is particularly interested in exploring patterns, processes, and regularities among political systems” (Wiarda 2000, p. 7).

Comparative politics is “the study and comparison of domestic politics across countries” (O’Neil 2015, p. 5).

“What is comparative politics? It is two things, first a world, second a discipline. As a ‘world,’ comparative politics encompasses political behavior and institutions in all parts of the earth. . . . The ‘discipline’ of comparative politics is a field of study that desperately tries to keep up with, to encompass, to understand, to explain, and perhaps to influence the fascinating and often riotous world of comparative politics” (Lane 1997, p. 2).

“Comparative politics . . . involves no more and no less than a comparative study of politics—a search for similarities and differences between and among political phenomena, including political institutions (such as legislatures, political parties, or political interest groups), political behavior (such as voting, demonstrating, or reading political pamphlets), or political ideas (such as liberalism, conservatism, or Marxism). Everything that politics studies, comparative politics studies; the latter just undertakes the study with an explicit comparative methodology in mind” (Mahler 2000, p. 3).

Instead, my goal is to help you understand the complexities and subtleties of defining the field. One of the best ways to accomplish this is by asking the type of questions posed earlier. Next, of course, I need to try to *answer* these questions, which is what I will endeavor to do in the remainder of this chapter.

In thinking about the definition of comparative politics, it is useful to recognize that comparative politics is not the only field in political science that focuses on countries or states as the primary **units of analysis**. Scholars in international relations, as suggested earlier, are also intimately concerned with countries or, more accurately, states. But IR scholarship is typically more interested in examining relations between and among states—that is, with their *interactions* in an international system. Even though this has not precluded IR scholars from looking at what happens inside states or countries, a good deal of research in the field has tended to treat states as undifferentiated wholes, which is to say that IR scholars (especially those associated with, until fairly recently, the dominant research school in IR, **realism** or **neorealism**) assume that states are *functionally alike* when interacting with other states. This is a critical assumption, largely because it suggests that it is possible to explain the behavior of states or countries *without* a careful examination of their internal workings and makeup (internal workings and makeup include such things as a country's political and economic systems, its cultural **norms** and traditions, and its specific historical experiences and **institutions**). The reasoning behind this assumption stems from the belief that the international system is **anarchic**, such that each and every state is forced to behave in similar ways regardless of its internal makeup or its domestic politics. The logic here is both simple and compelling: in an anarchic (as opposed to **hierarchical**) system, states must compete with other states for security, power, and influence. They must do so precisely because there is no ultimate rule-maker and rule-enforcer for the system as a whole. Lacking an ultimate authority, individual states (or actors) are forced onto the same basic path when dealing with other states. Each state must, in other words, do those things that ensure its own long-term survival. This generally means, among other things, building a strong army, developing a network of mutually beneficial military-strategic alliances, maintaining a diplomatic corps, gathering intelligence, and engaging in military conflict when necessary.

In this view, the internal makeup of a country is *relatively* unimportant in terms of explaining or predicting its external behavior. Thus, for example, a liberal democracy with a strong **presidential system** (such as the United States) would behave—with regard to its foreign policy decisions—in the same way that a single-party, **communist**-led dictatorship would.<sup>4</sup> In a similar vein, we would expect a state governed by an **Islamic** fundamentalist regime, say Iran, to act in essentially the same manner as any other

state. A more salient consideration would be the size and military capacity of a country. That is, a large, militarily powerful country would behave differently from a small, militarily weak country. The foregoing discussion, I should stress, is highly simplified and stylized; in addition, it fails to account for wide and significant divergences within IR scholarship.<sup>5</sup> Nonetheless, it is a useful way to grasp what has long been a basic distinction between IR and comparative politics. This is necessary if only because so many people, including some political scientists (at least those outside of IR and comparative politics), are largely oblivious to the differences between the two fields. Yet for the most part, the two fields have developed along very different lines, both theoretically and methodologically, and have only occasionally intersected in a significant and meaningful manner. This is reason enough to spend a lot of time defining comparative politics, for if we cannot even distinguish it from related fields, how can we reasonably talk about a comparative politics approach?

The strong tendency, in IR, to gloss over the domestic or internal characteristics of states or countries left a huge gap to be filled. Comparative politics has, almost by default, filled this gap, a fact reflected in earlier definitions of the field. In this respect, we might say that, whereas IR is generally based on an outside-in approach, comparative politics has generally been based on an inside-out approach. The different emphases of the two fields have in turn produced (at least in the past) a very clear-cut division of (intellectual) labor. Thus, as Nikolaos Zahariadis pointed out:

Comparative research tends to be geographic in orientation; that is comparativists generally describe themselves either as country specialists or as Europeanists, Africanists, Asianists, and so on. [Ironically, this has led many “comparativists,” in practice, to eschew engaging in comparative research; instead, many have become narrowly, even exclusively, focused on their country of expertise.] In contrast, divisions in international relations are more thematic and involve issues such as international conflict or international political economy that transcend geographic boundaries. (1997, p. 4)

Zahariadis is correct, but his observations do not go far enough. The division of labor between comparative politics and IR has resulted not only in different orientations and research interests but also in a belief, particularly among IR scholars in the **realist** school, that there is a very high, even impenetrable, wall between domestic and international politics.

### *Can the Internal Politics of a Place and the Impact of External Forces Be Understood Separately?*

All this brings us back to an integrally related issue, one raised earlier in the chapter—whether is it possible to understand the internal politics of a place without understanding the impact of external forces. *My* answer to



this question is a simple and unequivocal no. This impossibility, I think, has been true for a very long time (at least since the beginnings of **colonialism** in the fifteenth century) but is particularly true today. Processes such as **globalization** in all its various dimensions (a topic covered at length in Chapter 9), in particular, have made it nearly impossible to understand the internal dynamics of a country without looking at what happens on the “outside.” In practice, virtually all comparativists recognize this, although there is still a great deal of disagreement over the relative importance of internal versus external factors. Some scholars argue that external and, particularly, system-level factors—such as the **structure** of the world economy or particular relationships of **dependence** between poor and rich countries—are extremely and sometimes overwhelmingly important. Others argue that although such things matter, what matters most are the individual attributes of societies and their states. These individual attributes may derive from particular historical experiences, from culture, from specific types of institutional arrangements, and so on. The debate between these two sides is related to the main theoretical approaches in comparative politics, which we will cover in much more depth in subsequent chapters. For now, suffice it to say that although almost all comparativists now recognize the peril of defining the field strictly in terms of what happens inside a country, state, or society, there is no consensus on exactly what this means.

### *Another Definition of Comparative Politics*

Admitting that comparative politics cannot be limited to looking at what happens inside a country or other large social unit, I should stress, does not mean that we need to completely abandon any distinctions among fields of study, and especially between comparative politics and IR. We do need, however, to amend our definition of comparative politics. Thus, rather than defining comparative politics as a subject of study based on an examination of political phenomena *within* or *in* countries, we can say that comparative politics examines the interplay of domestic and external forces on the politics of a given country, state, or society. This amended definition, unfortunately, still does not tell us if it is legitimate to separate the study of politics from economics, society, culture, and so on. It is to this question that we turn next.

### **What Is Politics?**

Traditionally (that is, prior to the 1950s), comparative politics mainly involved *describing* the basic features of political systems. Most research in comparative politics, moreover, operated on the premise that politics referred exclusively to the *formal* political system—that is, to the concrete institutions of government (such as the parliament, the congress, and the bureaucracy) and to the constitutional and judicial rules that helped governments function.

Accordingly, early studies tended to be little more than factual and generally superficial accounts of how particular institutions of government operated and were organized or how certain laws were written and then passed. Such accounts may be useful and even necessary, but they can tell only a small part of what we need to know about politics. Even those political processes and actors closely associated with the formal political system—such as political parties, elections, foreign and domestic decisionmaking—were left out of these early studies. Politics, in short, was conceived of in very narrow terms.

### *A Process-Oriented Definition of Politics*

This narrowness began to change in the 1950s, when scholars laid a new foundation for the field of comparative politics and for political science more generally. There are several complex reasons for this, most of which are not necessary to discuss for present purposes. Suffice it to say, then, that the traditional concern with the formal and legalistic conceptualization of politics was challenged and ultimately cast aside in favor of a broader view. An influential article by Roy Macridis and Richard Cox (1953) symbolized this change. The two authors argued that the preoccupation with formal political institutions and judicial rules was too close to the study of law and not close enough to the study of politics, which, in contrast to the study of law, “observed that relations between society and authority were governed by judicial but also by informal rules and sometimes by brute force” (cited in Zahariadis 1997, p. 7). Although Macridis and Cox (along with several other prominent scholars) succeeded in breaking the hold of **formalism/legalism** in comparative politics, they did so only to a limited extent. This was true for two basic reasons. First, although the move away from formalism/legalism opened the door to comparative study of a broader range of political institutions and processes, politics was still defined primarily if not solely in relation to activities that involved the state or the government. Second, the discipline of political science generally and comparative politics specifically remained tied to the idea that politics—as a subject of study—could be separated from economics, sociology, history, geography, anthropology, or any other field in the social sciences and humanities.

The limitations of this latter view become particularly clear, noted Adrian Leftwich, “when one considers concrete problems in modern societies, such as unemployment in the industrial societies on the one hand, and rural poverty in the Third World on the other. The harder you think about these issues, the more difficult it is to identify them as strictly economic, social, or political in their causes or consequences” (1983, p. 4). I agree, which is why in this book we will begin with a concept of politics that is broader than what is offered in many traditional textbooks. This alternative definition, what we might call a *process-oriented* or *processual* definition

(Stoker and Marsh 2002), sees politics as part-and-parcel of a larger *social process*. In this view, politics “is about the uneven distribution of power in society [or between societies], how the struggle over power is conducted, and its impact on the creation and distribution of resources, life chances and well-being” (p. 9). This process-oriented definition, as should be clear, makes it difficult if not impossible to maintain firm boundaries between disciplines. To see this, consider, for example, how uneven distributions of power in societies come about in the first place. Are these uneven power distributions the product of history? Or do contemporary economic forces play the determinative role? What about the effects of culture, religion, custom, or even geography? Is it possible to say that one type of factor always predominates, or is there an inextricable interaction among these different forces—be they economic, social, political, cultural, geographic, and so on? The answer to all these questions is, I believe, fairly clear, and it boils down to the conclusion that politics is integrally and necessarily tied to history, culture, economics, geography, and a variety of other forces. In practice, I think, most comparativists agree with this view of politics, which is why comparative political analysis today tends to be wide-ranging and inclusive.

In addition to transcending disciplinary boundaries, a process-oriented definition of politics has at least two other implications. First, it clearly takes politics out of the governmental arena and puts it into almost all domains of life. These other domains include virtually all social and civil institutions and actors, such as churches, factories, corporations, trade unions, political parties, think tanks, ethnic groups and organizations, women’s groups, organized crime, and so on. Second, a process-oriented definition of politics reinforces our amended definition of comparative politics stated earlier (namely, “as a field that looks at the interplay of domestic and external forces on the politics of a given country, state, or society”). For it is clear that politics—as a struggle for power over the creation and distribution of resources, life chances, and well-being—is not something that can be easily compartmentalized into the domestic and international. This is because the activities that determine the distribution and use of resources (at least for the past few hundred years) are rarely confined to a single, clearly defined political territory; thus, as all politics is local (according to one popular saying), all politics is also potentially international and global.

### *Losing Focus?*

There are, I should note, many political scientists who would disagree with this broad conception of politics. We are already familiar with the basic argument, which essentially reverses the problem of narrow definitions. To wit: while narrow definitions exclude a lot of potentially important “stuff,” overly broad definitions may include too much. That is, because there are no neat boundaries telling us what is and what is not included in the scope

of the definition, we are studying both everything and nothing. Zahariadis, for example, would like us to differentiate politics from “corporate decisions”; the latter, he asserted, “affect only a specific corporation” (1997, p. 2). Yet just a little reflection tells us this is not always the case. Certainly there are myriad decisions made within a corporation (or within a family, factory, church, or other social institution) with very limited or no public or societal impact. At the same time, it is also true that a vast number of “private” corporate decisions have a clear and sometimes profound public dimension. By their very nature, in fact, many corporate decisions have a deep influence on how resources are obtained, used, produced, and distributed. Moreover, in an era of mega-corporations—where the largest firms are bigger, and often immensely bigger, than many countries in terms of command over economic resources—the suggestion that corporate decisions do not have a far-reaching public impact is difficult to maintain. Consider, in this regard, Wal-Mart. In the 2015 fiscal year, Wal-Mart’s total revenue (domestic plus international) amounted to \$486 billion (*Wal-Mart 2015 Annual Report*), which was more than the estimated **gross domestic product** (GDP) of all but thirty-eight countries that same year. More specifically, in 2015, Wal-Mart’s revenues put it between Belgium, with a GDP (based on a **purchasing power parity** [PPP] valuation) of \$492 billion, and Switzerland, with a GDP of \$481 billion. Needless to say, Wal-Mart’s revenues vastly exceeded the GDP of most of the world’s smaller countries. Haiti’s GDP, to cite just one example, was a paltry \$18 billion in 2015, or about 4 percent of Wal-Mart’s total sales. (All GDP figures cited in KNOEMA 2015; see Figure 1.3 for additional details.) It is not hard to see that Wal-Mart’s corporate decisions, in general, can and often do have a much greater political impact than decisions made in Haiti. Where, then, do we draw the line between public and private decisions? Is it even possible to do so? I would argue that the line, in some respects, has simply become too blurred to be of major significance today.

Admittedly, though, it would be a mistake for politics to be defined as “everything including the kitchen sink.” Indeed, as I discuss in subsequent chapters (and as suggested earlier), it is often necessary to provide clear-cut, precise definitions. This is especially true when trying to develop an argument or when trying to support a specific **hypothesis** or claim. After all, if one cannot precisely or adequately define what it is being studied—say democracy or terrorism—how can one possibly claim to say anything meaningful about that subject? In defining an entire field of study, however, precision is less important, but not irrelevant. The trick, then, is to develop a definition that is neither too narrow nor too unfocused. One solution, albeit a pragmatic one, is to acknowledge that the politics about which comparativists (and other political scientists) are most concerned, according to Gerry Stoker and David Marsh, is primarily *collective* as opposed to interpersonal,

**Figure 1.3 Wal-Mart vs. the World, 2015 Estimates**

The table below shows where Wal-Mart would rank, based on total revenue compared to GDP, if it were a country. The comparison, of course, is overly and perhaps fatally simplistic, but nonetheless gives a rough indication of the economic size and power of the company relative to a range of countries.

Rank	Country	Purchasing Power–Adjusted GDP (\$ billions)
1	United States	18,125
10	France	2,634
20	Taiwan	1,125
30	South Africa	725
—	<b>Wal-Mart</b>	<b>486<sup>a</sup></b>
40	Singapore	471
50	Qatar	346
60	Ireland	238
70	New Zealand	165
80	Libya	103
90	Côte d’Ivoire	77
100	Democratic Republic of Congo	62

*Sources:* Figure for Wal-Mart based on the 2015 fiscal year, and includes total revenues for Wal-Mart US, Wal-Mart International, and Sam’s Club (*Wal-Mart 2015 Annual Report*, [http://stock.walmart.com/files/doc\\_financials/2015/annual/2015-annual-report.pdf](http://stock.walmart.com/files/doc_financials/2015/annual/2015-annual-report.pdf)). GDP figures cited in KNOEMA 2015.

*Note:* a. Total sales.

and it involves interaction both *within* the public arena—that is, in the government or state—and also *between* the public arena and social actors or institutions (2002, p. 10). No doubt, this qualification will still be unsatisfactory to many political scientists, but it is also one upon which a large number of comparativists have chosen to base their research and analysis.

With all this in mind, let us now turn to the other major aspect of comparative politics—comparing—by posing a simple question.

### What Does It Mean to Compare?

In thinking about what it means to compare, let us first consider what Charles Ragin, a prominent social scientist, has to say: “Thinking without comparison is unthinkable. And, in the absence of comparison, so is all scientific thought and scientific research” (Ragin 1987, p. 1, citing Swanson 1971, p. 141). Although Ragin was citing another scholar, his own position is clear: in *all* the sciences—social and natural—researchers, scholars, and

students are invariably engaged in making some sort of comparison. If this is so (and it is fair to say that it is), then there is very little that sets comparative politics apart (on the surface, at least) from other fields of study. This is to say that the comparative strategies used by comparativists are not in principle different from the comparative strategies used by other political scientists or by sociologists, economists, psychologists, historians, and so on. But it does not mean that absolutely no differences exist: (very) arguably, one practice that sets comparative politics apart from other fields is the explicit and direct focus on the comparative method—as opposed to simply or informally “comparing.”<sup>6</sup>

The comparative method, as I will discuss in detail in the following chapter, is a distinctive mode of comparative analysis. According to Ragin (1987), it entails two main predispositions. First, it involves a bias toward (although certainly not an exclusive focus on) **qualitative analysis**, which means that comparativists tend to look at cases *as wholes* and to compare whole cases with each other. Thus the tendency for comparativists is to talk of comparing Germany to Japan, or the United States to Canada. This may not seem to be an important point, but it has significant implications, one of which is that comparativists tend to eschew—or at least put less priority on—**quantitative analysis**, also known as **statistical** or **variable-centered analysis** (Ragin 1987, pp. 2–3). In the social sciences, especially over the past few years, this orientation away from quantitative and toward qualitative analysis definitely sets comparativists apart from other social scientists. Even within comparative politics, however, this is beginning to change. The second predisposition among comparativists is to value *interpretation* and *context* (pp. 2–3). This means, in part, that comparativists (of all theoretical orientations, I might add) begin with the assumption that “history matters.” Saying that history matters, I should caution, is much more than pointing out a few significant historical events or figures in an analysis; instead, it involves showing exactly how historical processes and practices, as well as long-established institutional arrangements, impact and shape the contemporary environment in which decisions are made, events unfold, and struggles for power occur. It means, in other words, demonstrating a meaningful continuity between the past and the present. This is not easy to do, but for a comparativist using history, it is often an essential task. (See Figure 1.4.)

Although understanding the predisposition of comparativists is important, this still doesn’t tell us what it means to compare—a question that may seem easy to answer, but in fact is not. Just pointing out or describing differences and similarities between any two countries, for example, is not by any account the be-all and end-all of comparative analysis. Indeed, staying strictly at the level of superficial description—for example, China has a **Confucian** heritage, whereas the United States does not; both France and Russia experienced **social revolutions**—one will never genuinely engage in



most comparative analyses, actual **control variables** are not used. This issue may not be very clear right now and, for our purposes, is not critical. The main point is this: different types of comparisons allow a researcher to treat a wide variety of similarities *or* differences (depending on the particular comparative principle used) as if they are control variables. In so doing, the researcher can safely eliminate a whole range of potentially significant factors and instead concentrate on those variables deemed most important. This is what Michael Moore implicitly did in his film when, to show that his argument was right, he compared the United States and Canada. More specifically, he asserted that because the two countries shared a number of common features, for example, a high rate of gun ownership, ethnic diversity, and exposure to violence in entertainment, none of the commonalities could explain why the United States was a such violent society. In other words, in that comparison, he was treating all the similarities between the two countries as control variables in order to assess how lower or higher levels of fear impact the gun homicide rate in the two countries.

Unfortunately, comparative checking usually cannot (indeed, can almost never) provide definitive answers. This is true, in part, because comparative checking is an imperfect mode of analysis, at least when comparing many complex real-world cases. It is also true, in more substantive terms, because comparison is not the best method of control in scientific analysis. There are much better methods of control, such as the **experimental method** and statistical control. “But,” as Sartori also noted, “the experimental method has limited applicability in the social sciences, and the statistical one requires many cases” (1994, p. 16), something that research in comparative politics generally lacks (this is referred to as the **small-N** problem). Like it or not, therefore, comparison often represents only a second-best method of control in the social sciences and comparative politics.

Despite its second-best status, comparing to control is an undeniably important purpose of comparative analysis. Yet many comparativists, especially those with a strong predisposition toward qualitative and historical analysis, are not always, or even mostly, involved in (formally and rigorously) testing hypotheses through their comparisons (Ragin 1987, p. 11). Instead, as Ragin noted, many comparativists “*apply theory* to cases in order to interpret them” (p. 11, emphasis in original). We will see examples of this in subsequent chapters, but what Ragin meant, in part, is that comparativists recognize that countries or other types of **macrosocial** units all, in important ways, have a unique story to tell. Ragin suggested, therefore, that some researchers are often most interested in using comparative analysis to get a better grasp of these *individual* “stories,” rather than primarily using them as a way to verify or falsify specific arguments or hypotheses. In other words, for these researchers, in-depth understanding is the goal of comparative analysis. Comparing to understand, to put it in slightly



different terms, means that researchers use comparison to see what other cases can tell them about the specific case or country in which they have the most interest.

In a similar vein, some comparativists assume that the sheer complexity of real-world cases makes control a worthwhile but difficult, if not impossible, goal to achieve. Instead, they advocate a more pragmatic approach that attempts to build theoretical generalization—or **explanation**—through an accumulation of case-based knowledge (this is sometimes referred to as **analytical induction**). In this view, it is understood that no case, by itself, or no comparison of a small number of cases is sufficient to test a theory or general claim. This is largely because the overwhelming complexity of any given case makes any test problematic and highly contingent. Instead, each case or each small-N comparison provides comparativists another piece (albeit often a very complicated piece in and of itself) to work into a much larger puzzle. I will come back to this issue—and specifically the issue of **complex causality**—later.

Even though the foregoing discussion may be a little confusing, the key point is simply that, although researchers use comparisons for different reasons, doing comparative politics requires that you be aware of *your* reason and rationale for making a comparison. Figure 1.5 provides a summary of the three general purposes of comparing.

### What Is Comparable?

Another important question about comparing involves the issue of exactly what one can compare. What, to put it simply, is comparable? Again, the answer may seem obvious at first blush, especially in the context of comparative politics. For instance, it certainly seems reasonable to assert that countries (governments, societies, or similar entities) are comparable. Yet why should this be the case? One basic answer is that all countries share at least some common attributes—for example, they all occupy a territory defined by political boundaries, they all represent the interests of a political community, they are all recognized (albeit not always officially as in the case of Taiwan or Palestine) by other countries or states, and so on. Implicitly, this is why most everyone assumes, to paraphrase a common saying, that oranges can be compared to other oranges, and apples can be compared to other apples (while, of course, apples and oranges cannot be compared to each other). At the same time, countries each differ in some meaningful ways. Indeed, it is fair to say that differences are crucially important in any type of comparative analysis. After all, if all countries were exactly alike, there would be no reason to compare them. Think about this last point for just a moment. Why, to repeat the basic question, is there nothing to be learned from comparing two completely identical units of analysis? Methodologically speaking, the answer is clear: comparing completely

**Figure 1.5 Three Purposes of Comparing: A Summary**

	Comparing to <i>Control</i>	Comparing to <i>Understand</i>	Comparing to <i>Explain</i>
Basic strategy or purpose	Comparative checking	Interpretation	Analytical induction
Logic or approach to comparative analysis	Researcher uses a range of cases as a way to test (verify or falsify) a specific claim, hypothesis, or theory.	Researcher is primarily interested in a single case and uses different cases or general theories as a way to learn more about the case being studied.	Researcher uses cases as a way to build a stronger theoretical explanation. Cases are used in a step-by-step manner, with each case contributing to the development of a general theory.
Simple example	(1) <i>Begin with a claim:</i> A high level of gun ownership will lead to a high level of gun-related homicide. (2) <i>Test the claim:</i> Researcher examines a range of countries in order to control for gun ownership; if countries with the highest rates of gun ownership have low rates of gun-related homicides (and vice versa), the claim is falsified and must be rejected.	(1) <i>Begin with case (and issue):</i> The high level of homicides in South Africa. (2) <i>Use existing theories and other cases to better understand case:</i> Researcher uses a range of theories on gun violence to better understand why South Africa is the most violent country in the world. Researcher also uses other cases to see what those cases can tell him about South Africa.	(1) <i>Begin with general theory:</i> Structural theory of democratization. (2) <i>Use various cases to strengthen the theory:</i> Researcher begins by looking at the democratization process in Mexico. This examination may lead researcher to revise elements of theory; the researcher then looks at Taiwan, Poland, and Ukraine. Each case is used as a steppingstone in developing or strengthening original theory.

identical units does not allow us to assess the significance of any particular variable. In this respect, we might say that comparing apples to oranges generally makes more sense than comparing oranges to oranges or apples to apples.

Thus, to determine what we can compare, we can begin by saying that we can compare “entities whose attributes are in part shared (similar) and in part non-shared” (Sartori 1994, p. 17). Accordingly, we can say that countries are comparable to each other—as are provinces or states (such as California and Texas), cities, and neighborhoods—because all countries share certain attributes, but also differ from each other in a variety of ways. Saying all this, however, still doesn’t tell us all we need to know. Is it appropriate, for instance, to compare the United States to Côte d’Ivoire, Japan, Indonesia, Guinea-Bissau, or New Zealand? Similarly, is it appropriate to compare California to Rhode Island or New York state, or Los Angeles to Philadelphia (or Seoul, London, or Paris)? It depends on what the researcher is hoping to accomplish; it depends on what the focus of analysis is; it depends on the particular research design the researcher plans to use; and it depends on the range of similarities and differences between or among the units of comparison. This is an obvious point; still, it is one worth making because, when phrased as a question—“On what does our comparison depend?”—it forces the researcher to think more carefully about how to design their study. It forces the researcher, as well, to *justify* the comparisons ultimately made.

What we can compare, I should stress, is definitely not limited to countries or other geographic entities (more on this in Chapter 2). Nor is it necessarily limited to comparable data from two or more countries. Such a restriction, for example, would automatically exclude comparatively oriented but single-country (or single-unit) **case studies**, including such classic comparative studies as Alexis de Tocqueville’s *Democracy in America* ([1835] 1988) and Emile Durkheim’s *The Elementary Forms of the Religious Life* ([1915] 1961) (both cited in Ragin 1987, p. 4). As Ragin explained it, “Many area specialists [i.e., researchers who concentrate on a single country] are thoroughly comparative because they implicitly compare their chosen case to their own country or to an imaginary or theoretically decisive ideal-typic case” (p. 4). Other scholars, including Sartori, would disagree, or at least would be quite skeptical of the claim that single-country case studies can be genuinely comparative. Sartori wrote, for example, “It is often held that comparisons can be ‘implicit.’ . . . I certainly grant that a scholar *can be* implicitly comparative without comparing, that is, provided that his one-country or one-unit study *is* embedded in a comparative context and that his concepts, his analytic tools, are *comparable*. But how often is this really the case?” (1994, p. 15, emphasis in original).<sup>7</sup> Sartori made a good point, but so too did Ragin. My own view is that single case studies can be comparative if the researcher is clear about the “comparative context.” But this is far less difficult than Sartori implies. (I will return to a discussion of this point in the following chapter.) There is, I might also note, a special type of case study, which is referred to as a **within-case comparison**. A within-case comparison examines an ostensibly single case over

time, during which there is a significant change in the variable or variables under investigation.<sup>8</sup> As I discuss further in Chapter 2, this is actually a type of binary comparison, and one that is unequivocally comparative.

We are not going to resolve the debate here. Suffice it to say, then, that doing comparative analysis requires far more than just looking at a foreign country or just randomly or arbitrarily picking two or more countries to study in the context of a single paper or study. It is, instead, based on a general *logic* and on particular strategies that guide (but do not necessarily) determine the comparative choices we make. Understanding the logic of comparative analysis, in fact, is essential to doing comparative politics. Needless to say, this will also be an important topic of discussion in Chapter 2. But to conclude for now our general discussion of comparing, it would be useful to consider some of the advantages of the comparative method (a topic also addressed in the following chapter).

### **What Are the Advantages of the Comparative Method?**

Earlier I noted that comparativists tend to look at *cases as wholes* and to compare whole cases with each other. There are important advantages to this practice, the first and most important of which, perhaps, is that it enables researchers to deal with complex causality (or causal complexity). At one level, complex causality is an easy-to-grasp concept. After all, there is little doubt that much of what happens in the “real world” is an amalgam of economic, cultural, institutional, political, social, and even psychological processes and forces. Not only do all these processes and forces exist independently (at least to some extent), but they also *interact* in complicated, difficult-to-discern, and sometimes unpredictable (or contingent) ways. Thus, in studying a particular phenomenon—say, political violence—it is likely that several or even dozens of factors are at play. Some factors may be primarily economic, such as poverty, unemployment, and unequal income distribution. Other factors may be cultural (for example, specific religious values and practices, community norms), political (for example, lack of democracy or a skewed distribution of political power, which itself could be based on religious or ethnic differences), socioeconomic (for example, strong **class**-based divisions), and so on. An adequate understanding of political violence may have to take all these factors into account and will likely have to specify their interrelationship and interaction within certain contexts. Ragin provided a very useful, three-point summary of complex causality:

First, rarely does an outcome of interest to social scientists have a single cause. The conditions conducive for strikes, for example, are many; there is no single condition that is universally capable of causing a strike. Second, *causes rarely operate in isolation*. Usually, it is *the combined effect* of various conditions, *their intersection in time and space*, that produces a certain outcome. *Thus, social causation is often both multiple and conjunctural, involving*

*different combinations of causal conditions.* Third, a specific cause may have opposite effects *depending on context.* For example, changes in living conditions may increase or decrease the probability of strikes, depending on other social and political conditions. . . . The fact that some conditions have contradictory effects depending on context further complicates the identification of empirical regularities because it may appear that a condition is irrelevant when in fact it is an essential part of several causal combinations in both its presence and absence state. (1987, p. 27, emphasis added)

The point to remember is that other methods of inquiry (such as the experimental method and statistical analysis) cannot, in general, adequately deal with complex causality. Comparative (case-oriented) analysis, by contrast, is especially—perhaps uniquely—suited for dealing with the peculiar complexity of social phenomena (Rueschemeyer 1991). Why? Quite simply because comparative analysis, to repeat a point made earlier, can and often does deal with cases as a whole—meaning that a full range of factors can be considered at once within particular historical contexts (which themselves vary over time). This is especially apparent with regard to deviant or anomalous cases. Comparative analysis can help explain why, for example, some relatively poor countries—such as India, Mauritania, and Costa Rica—are democratic, when statistically based studies would predict just the opposite.<sup>9</sup> To account for such anomalous cases (as many comparativists might argue), we need to look very closely at the particular configuration of social, cultural, socioeconomic, and political forces in these individual countries, and understand how, from a historical perspective, these configurations emerged and developed. We also need to understand how external forces and relationships interacted with the domestic environment to produce the specific results that they did. None of this is likely to be achieved, to repeat, without considering the whole context of each individual case.

A second, strongly related advantage is that comparative analysis (especially when carried out in a qualitative as opposed to quantitative manner) allows the researcher to better understand or explain the relationship between and among factors. Quantitative or statistical research, by contrast, does a very good job in showing that relationships *exist* (for example, that capitalist development is related to democratization) but does not generally do a good job at telling us what the nature or underlying dynamic of this relationship is. To use a metaphor from aviation, we might say that quantitative analysis shows a strong **correlation** between engine failure and plane crashes, but it typically does not tell us the exact reasons (or the chain of causal events leading to the crash—since not all engine problems, even very similar ones, lead to the same outcome, and vice versa). To find out the reasons planes crash, therefore, investigators almost always have to look inside the “black box” or flight data recorder (see Figure 1.6).<sup>10</sup> They have to analyze the myriad factors—some of which will undoubtedly be



one can explain or understand anything simply by appealing to the “facts” (a view reflected in the oft-heard statement “Let the facts speak for themselves”). One way to rectify this problem is to simply become more self-conscious and explicit about theory/theorizing; this has the added benefit, I might add, of helping oneself become a more disciplined, critical, and analytic thinker. Thinking theoretically about comparative politics, in this regard, has value well beyond the confines of this particular subfield. The same can be said about thinking comparatively, which is the topic of our next chapter.

To sum up, *doing comparative politics* requires, minimally, a clear-eyed understanding of what comparative politics is, of what it means to compare, and of the importance and necessity of theory. There is, of course, more to doing comparative politics than just these three requirements, but they constitute an essential foundation upon which everything else will stand.

## Notes

1. Terms that appear in boldface type are defined in the book’s glossary.

2. This seems an obvious point about which most scholars would agree. Yet the distinction between US politics and comparative politics still exists in the United States. There are, of course, plenty of reasons for this, one of which is that it is natural for people to see their own country or society as separate and distinct from other places. Nonetheless, there is no solid justification for the distinction. As Lee Sigelman and G. H. Gadbois nicely put it, “the traditional distinction between American and comparative politics is . . . intellectually indefensible. . . . Comparison presupposes multiple objects of analysis . . . one compares something to or with something else” (1983, cited in Sartori 1994, p. 14).

3. Most researchers in the field, as noted, can probably agree on a basic, but very general, definition of comparative politics (such as the ones listed in Figure 1.2). There is far less agreement, however, on how the field should be constituted in terms of a particular theoretical or even methodological approach. In a wide-ranging discussion on the role of theory in comparative politics, for example, some of the leading names in comparative politics and comparative analysis fail to achieve a consensus on what is or should be the theoretical core of the field (see Kohli et al. 1995).

4. I should note, however, that there has never been unanimous agreement on this point. Indeed, one of the main areas of controversy in international relations theory today revolves around the “democratic peace thesis” (Doyle 1995). The crux of this argument is that liberal (or democratic) states do not go to war with other liberal states. In essence, advocates of the democratic peace thesis argue that there is something unique about the *internal* constitution of liberal states that changes their behavior in relation to other liberal states.

5. For obvious reasons, I cannot provide a detailed and nuanced discussion of international relations theory here. Fortunately, there are a number of very good introductory texts that do just this. One good book to start with is *The Globalization of World Politics: An Introduction to International Relations* (2014), edited by John Baylis, Steve Smith, and Patricia Owens (and now in its sixth edition).

6. Despite the fact that the field is defined in terms of particular method—that is, comparison—there are many scholars in the field of comparative politics who, according to Giovanni Sartori, “have no interest, no notion, no training, in comparing”

(1994, p. 15). The reason, I might note, may have more to do with the ethnocentric way the field has been defined than with the scholars themselves. To understand this point, consider the fact that comparative politics (in the United States) has been defined, most simplistically, as “studying other countries.” Thus, as Sartori put it, “a scholar who studies only American presidents is an Americanist, whereas a scholar who studies only French presidents is not” (p. 14). The US-based scholar who decides to study only France, in other words, is only classified as a “comparativist” by dint of his or her interest in a country other than the United States.

7. Later, Sartori stated his case more strongly. “I must insist,” he contended, “that as a ‘one-case’ investigation the case study cannot be subsumed under the comparative *method* (though it may have comparative merit)” (1994, p. 23, emphasis in original).

8. One prominent comparativist, Dietrich Rueschemeyer, seemed to agree with me on this point. As he put it, “Even in single-case studies comparative awareness and especially a longer time span of investigation can—logically analogous to cross-country comparisons—make the structural conditions of different event sequences more visible” (1991, p. 29).

9. Costa Rican democracy, especially, has been an issue of special interest to comparativists, since it constitutes, according to Dietrich Rueschemeyer, Evelyne Stephens, and John Stephens, “the real exception to the pattern [of authoritarianism] prevailing in Central America” (1992, p. 234).

10. Rueschemeyer, Stephens, and Stephens made a very strong argument on this point. They noted that, although cross-national statistical work has shown an undeniable and very strong link (correlation) between capitalist development and democracy, this correlation, by itself (and no matter how many times it is replicated), “does not carry its own explanation.” “It does not,” they continued, “identify the causal sequences accounting for the persistent relation, not to mention the reason why many cases are at odds with it. Nor can it account for how the same end can be reached by different historical routes. The repeated statistical finding has a peculiar ‘black box’ character that can be overcome only by theoretically well grounded empirical analysis” (1992, p. 4).