BSSn4495: Qualitative research in security studies

Case selection and generalization

April 12, 2022 Miriam Matejova, PhD





Agenda

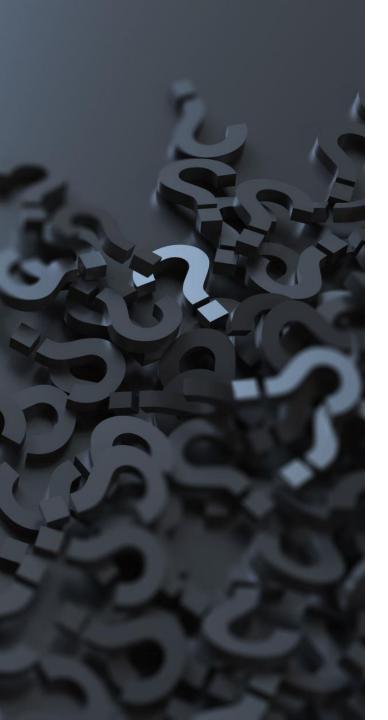
- Cases and case study
- Generalization

Case

- "A spatially and temporally delimited phenomenon of theoretical significance" (Gerring 2017)
- States or state-like entities, organizations, social groups, events, individuals
- Cases = units, with the added implication that a case has a temporal boundary

Case study

- "the intensive (qualitative or quantitative) analysis of a single unit or a small number of units (the cases), where the researcher's goal is to understand a larger class of similar units (a population of cases)" (Seawright and Gerring 2008)
- "the detailed examination of an aspect of a historical episode to develop or test historical explanations that may be generalizable to other events" (George and Bennett 2005)



How do we pick cases?

- We want:
 - -A representative sample
 - A variation on the dimensions of theoretical interest

Types of case study

- -Atheoretical,
- -interpretive,
- -hypothesis generating,
- —theory testing (confirming or infirming),
- deviant case studies,
- most-likely and leastlikely case studies

Types of generalization

- Broader category of space
- Broader category of time
- Broader category of persons
- Broader category of substantive phenomena

Specific vs. general knowledge

• SPECIFIC

- What caused the Rwandan civil war?
 - Hutu-Tutsi hatred
 - Belgian race policies
- Explains a case



- What causes civil war?
 - Ethnic diversity/hatred
 - Colonial race policies
- Explains a phenomenon



SPECIFIC

EXPLANATION

→ A THEORY OF CIVIL WAR

Specific to general

- MORE SPECIFIC: A cause of "increased welfare spending"(E) in the US from 1960 to 2000 is "whether the government is headed by a Left Party"(C)
- MORE GENERAL: A cause of "increased welfare spending"(E) in the advanced industrialized countries in the post-war period is "whether the government is headed by a Left Party"(C)

From specific to general, and back again

- Specific cases inspire hunches about general phenomena
- General hunches **tested** against specific cases
 - A few, or
 - Lots

→ BUILDING AND TESTING **THEORIES**

 Understanding of general phenomenon can help explain specific cases

Basis for generalization

- Two factors that limit our ability to generalize:
 - Conditional effects: Whether C has an effect on E may depend on a set of "background conditions" that exist in certain contexts and not others (i.e., conjunctural causation)
 - Conceptual stretching: Causes and effects may mean different things in different contexts