

BSSn4495: Qualitative research in security studies

Case selection and
generalization

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LOGIC LANE



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)

Types of case study

- atheoretical,
- interpretive,
- hypothesis generating,
- theory testing
(confirming or
infiriming),
- deviant 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**

————— SPECIFIC
EXPLANATION

- GENERAL

- What causes civil war?

- Ethnic diversity/hatred
 - Colonial race policies

- Explains a **phenomenon**

————— GENERAL
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