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Abstract

Paired comparison is a strategy of political analysis that has been widely used but seldom theorized. This is because it is often assimilated to single-case studies or regarded as a degenerate form of multicase analysis. This article argues that paired comparison is a distinct strategy of comparative analysis with advantages that both single-case and multicase comparisons lack. After reviewing how paired comparison has been dealt with in comparative politics, the article details a number of its advantages and pitfalls, illustrates them through the work of four major pairing comparativists, and proposes what is distinct about the strategy. It closes with a number of suggestions for using paired comparison more effectively.

Keywords

paired comparison, methodology, comparative theory

This article examines a strategy of comparative analysis that has been widely used but little theorized—paired comparison. It has been used since Alexis de Tocqueville used it implicitly across his two most famous books, *Democracy in America* and *The Old Regime and the French Revolution*. And it has recently been used effectively by authors as different as Valerie Bunce, Peter Hall, Peter Katzenstein, Seymour Martin Lipset, Robert Putnam, and Richard Samuels. Tocqueville adopted the method as part of a voyage of discovery.

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But like many who have used the strategy more systematically—including the present author¹—he had no theory of practice to guide him. Others have thought about the method but have usually seen it as a variant of single-case study or as a degenerate case of large-N analysis. Developing a theory of practice for this widespread strategy of comparative politics is the goal of this article.

What do I mean by “a theory of practice”? I mean something very similar to what Charles Tilly meant when he wrote that no one

can pursue empirical social research effectively without deploying and testing two interdependent bodies of theory simultaneously: a theory embodying explanations of the phenomenon under investigation, and another theory embodying explanations for the evidence concerning that phenomenon. (2008, p. 47)

The “theory of practice” to which the subtitle of this article refers is the second one: how evidence collected from the practice of paired comparison is assembled, is evaluated, and can be judged. I argue that paired comparison is a method of political analysis distinct from both single-case studies and multicase analysis. Moreover, although paired comparison is most often associated with qualitative approaches, it is compatible with a variety of specific methods. First, I review the ways in which the method has been used and then how it has been treated in the growing how-to literature in comparative politics. Second, I argue that it is compatible with both most-similar and most-different cases and with both correlational and causal-process logics of analysis, illustrating my argument with summaries from the work of four distinguished comparativists. Next I say what I think is distinct about paired comparison and offer some reasons why scholars in comparative politics have been attracted by it. Fourth, I add some cautionary notes about its major pitfalls but try to respond to each of them. Finally, I propose some provisional answers to the question “How can the strategy of paired comparison be used more broadly and more effectively?”

A Widespread and Successful Practice

The practice of paired comparison has been used in a variety of sites and settings. It has been used to compare similar and different countries; to study large processes; to compare voters, parties, and public opinion; to study political contention; and to examine different levels of the polity.² With such widespread use of a method in comparative politics, one might suppose that

it would be easy to find practitioners who have theorized carefully about its uses and limitations. But apart from the obvious idea that two cases tell us more than one, scholars have not yet addressed four questions that are important in constructing any theory of practice:

- What is distinct about paired comparison?
- What are its strengths and weaknesses?
- What are the different ways in which paired comparison has been used?
- How can it be used more systematically and effectively?

This article proposes some answers to these questions.

Thinking About Paired Comparison

Although the literature on comparative methodology has contributed much to our understanding of both single-case studies and large-N analysis and about qualitative comparative analysis (Ragin, 1987, chapters 6-8), it has had little to say about paired comparison per se. Many authors either see paired comparison as “case study plus one” or as a degenerate version of large-N comparison.

Neither of the two major theoretical statements in the quantitative tradition gives paired comparison more than passing notice. Adam Przeworski and Henry Teune’s *Logic of Comparative Social Inquiry* (1970) assumed the regression equation as the modal form of comparative analysis. Although they occasionally cited work that used paired comparisons (Converse & Dupeux, 1962; Dogan, 1967) and even compared pairs of cases here and there (1970, pp. 80, 128). In dismissing “proper names” as viable subjects for study, Przeworski and Teune implicitly guided their readers away from paired comparison.

Gary King, Robert Keohane, and Sidney Verba’s *Designing Social Inquiry* (1994) is more nuanced. Generous to a fault in offering the advantages of causal inference to their qualitatively oriented cousins, King, Keohane, and Verba found much to praise in single-case analysis but relegated paired comparison to the status of a residual category, one that “can yield valid causal inferences” but usually remains “essentially descriptive” (King et al., 1994, p. 45).

When we turn to the qualitative tradition, we find that even its staunchest advocates, Henry Brady and David Collier, offer little guidance for using paired comparison in their diverse edited volume *Rethinking Social Inquiry*

(2004). Collier, together with his partner, Ruth Berins Collier, is a past master of the method (Collier & Collier, 1991). But among the contributions by Brady, Collier, and their collaborators, I found only three direct references to “paired comparison” (pp. 94, 247, and 265) and only one to “matching cases” (p. 108).

Practitioners of comparative politics have recently begun to think seriously about the practice of paired comparison. In their landmark book, *Case Studies and Theory Development*, Alexander George and Andrew Bennett made a strong case for the method of “controlled case comparison” (2005, pp. 59, 80, chap. 8). George and Bennett do not ignore the difficulties in using paired comparison. But they argue that some of the problems can be addressed by careful attention to process tracing, an argument to which I will turn below. Their main advice is to shift from lateral paired comparison to before-and-after analyses of the same case (pp. 81-82). But this is only another way of carrying out the method of process tracing that they favor and offers little help to those who wish to compare different political systems.

The most exhaustive examination of case methods, John Gerring’s *Case Study Research* (2007), gives the technique of “matching cases” two pages but then assimilates paired comparison to the single-case study, noting that “case study research may incorporate several cases, that is, multiple case studies” (p. 20). Gerring does offer an excellent examination of paired comparison in his discussion of case selection (chap. 5) and of internal validity (chap. 6). But his definitional assimilation of “a few cases” to single-case analysis does not help us to understand if there is anything particular about paired comparison.³

We have a long way to go in understanding the strengths and pitfalls of paired comparison. We can begin by distinguishing two dimensions that appear regularly in the literature on paired comparison: between most-different and most-similar systems and between correlational and causal process analysis.

Comparing Most-Different and Most-Similar Systems

Scholars who have reflected on the strategy of paired comparison almost invariably turn to the methods proposed by John Stuart Mill—the methods of similarity and difference. But what Mill was describing were varieties of the experimental method and not of the comparative analysis of social or political phenomena. And he saw that there would be many situations in which neither the method of agreement nor the method of difference would suffice but in which a combination of the two would be necessary—what he called “the joint method of agreement and difference” (1973, pp. 394-396).

Some scholars have seen Mill's two logics as similar to Przeworski's and Teune's distinction between most-similar and most-different systems analysis (Gerring, 2007, p. 139). I think these are different dichotomies and that the latter is more useful to social or political analysis than the former. According to Przeworski and Teune and Gerring, there are two main ways of carrying out comparative analysis:

- Most-similar systems design, in which common systemic characteristics are conceived of as "controlled for," whereas intersystemic differences are viewed as explanatory variables (Przeworski & Teune, 1970, p. 33)
- Most-different systems analysis, in which "variation on the independent variable is prized, while variation on the outcome is eschewed" (Gerring, 2007, p.139).⁴

The first method implies minimizing the differences between the systems being compared, whereas the second implies maximizing these differences.⁵

Przeworski and Teune and others have criticized most-similar systems designs because "the experimental variables cannot be singled out" (1970, p. 34). This is certainly true, but as Gerring and others have pointed out, comparing similar systems has some advantages:

- Even if the specific variables that unite systems cannot easily be sorted out from one another, the method can direct attention to the ways in which they differ (Gerring, 2007, pp. 133-135).
- In exploratory research or in the exploratory phase of more rigorous designs, a second case can confirm a tentative finding from a single case (Gerring, 2007, p. 131).
- "Matching" techniques can be used to select cases for intensive comparison within a large-N sample (Gerring, 2007, pp. 135-137).
- Besides, some cases are inherently interesting because they take contrasting routes to similar outcomes—like the differences in the paths of democratization of Britain and France (Tilly, 2004).

The most-different approach implies a different strategy. As Gerring puts it, in this approach "the researcher tries to identify cases where just one independent variable...as well as the dependent variable...covary, while all other plausible factors...show different values" (2007, p. 139). An example is the "most-different systems" design used by Valerie Bunce in her *Do New Leaders Make a Difference?* (1981). In the face of the enormous differences between these two types of system, leadership succession appeared to produce

a fundamental similarity—early policy innovation. Using a combination of budgetary data and policy case studies, the similarities proved to be robust across policy areas and using different kinds of data. New leaders made a difference because they implemented new or revised policies in a spurt of policy innovation that slowed down as their terms proceeded.

Bunce saw the process of succession in two parts: the campaign for office (e.g., how power is won and maintained) and the honeymoon of new leaders once they are in office. For both periods Bunce outlines a number of processes leading new leaders to innovate: In the West the opening up of issues during the campaign puts pressure on successful candidates to take action once elected (1981, pp. 225-226); in the East successions, “which provide provisional mandates...are solved only when one contender manages to convince the other...elites around him that he in fact can govern by responding to their needs and those of the system” (p. 22).

Most-different case analysis is particularly prone to the “many variables, too few cases” criticism that has been leveled at small-N studies in general. But it has advantages that elude similar case analysis:

- Drawing attention to similar or identical processes in a wide variety of cases can expand or limit the scope conditions of established research findings (McAdam, Tarrow, & Tilly, 2001, chap. 10).
- Examining outliers within a large-N population of cases can help to identify the variable or variables responsible for general outcomes of interest in core cases when these are reversed in the case of the outlier.
- Widely dispersed cases may be of political interest even when they break some of the canons of best-case analysis.

Neither most-different nor most-similar system analysis is inherently superior. Which we choose depends on the problem under investigation and not on some imaginary “best practice.” Tocqueville (without knowing the term) chose a distinctive most-different systems analysis in his two books on France and the United States, whereas Putnam, although in debt to Tocqueville, chose a most-similar systems analysis in comparing northern and southern Italy. Each illustrates both the virtues and the pitfalls of the strategies they chose.

Tocqueville in America

Because *Democracy in America* and *The Old Regime and the French Revolutions* appeared decades apart and are read by different groups of readers, their

fundamentally comparative structure is often overlooked. But both books address the same fundamental problem: the role that state centralization plays in relation to intermediate associations and democracy. Between them, they reveal that Tocqueville was engaged in a “voyage of discovery,” one that left him susceptible to seeing America through French eyes and, incidentally, left him unable to see the potential for rupture in America’s contentious politics.

Why did the revolution break out in France, Tocqueville asked, rather than in one of Europe’s more backward countries (1955, p. x)? His answer was that state centralization denuded the aristocracy and other corporate groups of their positive functions, reducing them to parasitic burdens on society and leaving that society without its “natural” sources of civic initiative and balance. Because a society stripped of intermediate bodies lacked a buffer between state and society, Frenchmen became “self-seekers practicing a narrow individualism and caring nothing for the public good” (1955, p. xiii). The result was jealous egalitarianism, sporadic and uncontrolled mobilization and, ultimately, The Revolution: “a grim, terrific force of nature, a newfangled monster, red of tooth and claw” (1955, p. 3). The lesson Tocqueville drew was that the stronger the state, the weaker would be civic participation and the greater the incentive to violence when collective action did break out. No one would want to live in such a state, and after a decade of terror and chaos, a despotism more absolute than the Old Regime resulted. Thus Tocqueville arrived at one of his more brilliant insights: that rather than the antithesis of the Old Regime, Napoleon’s empire was its natural successor.

Traumatized by the French experience of democracy/despotism, when Tocqueville came to America he found the lack of a strong central government invigorating. In his view of America, decentralization played an important role, both in leaving space for intermediate associations to flourish and fracturing potentially oppressive majorities that might—as in the First French Republic—have led to despotism. Thus, the history of his own country’s centralization lay implicitly behind his understanding of the wellsprings of pluralistic democracy in America.

But there was an aspect of American politics that Tocqueville didn’t understand very well: the nature of our contentious politics. Because he did not see the kind of ideological politics he had gotten used to in France (recall that he came to America to escape the results of the 1830 revolution), Tocqueville failed to see the turbulence that lay just below the surface of American politics. Slavery he abhorred, both on ethical grounds and because it produce a lazy and corrupt white plantocracy; but because he admired decentralization, he failed to see the potential for states’ rights to produce a civil war.

Tocqueville's chain of causation from centralization to civic atomization, and from there to extremist democracy and thence to a new despotism, may or may not have been correct for France. The important point is that it led him to transfer to the United States—in inverted form—the connection he saw in France between centralization and intermediate bodies and to ignore the fundamental differences in the two countries (1955, pp. 61-68). Turning the coin of centralization/decentralization onto its American side, he posited that a state without a centralized bureaucracy would not smother local initiative and would avoid the dangers of the cycle of extremism and tyranny he had witnessed in France.

Beginning from structuralist preconditions, Tocqueville elaborated what we today would call a most-different systems design. Combined with his intuitive talent as an observer, his contrasts between centralization/decentralization and old regime/new state gave zest to his accounts of both countries' histories. But his voyage of discovery to America was too deeply impregnated with a Frenchman's fears and preconceptions, and he failed to see that the differences between the French old regime's corporate structures and the new American state's associations were too wide for effective comparison. The method of comparing most-similar systems adopted by Robert Putnam effectively attacked just this problem.

Putnam in Italy

Using a most-similar systems design, Robert Putnam and his collaborators studied the determinants of policy performance in the two major regions of Italy. Structured by the same political institutions, the two regions responded in diametrically opposed ways to the same regional reform. Putnam and his collaborators used a series of paired comparisons of these similar systems to show how unevenly the institutional innovation of the regional reform affected the practice of administrative politics. They argued that the differences were the result of the two regions' very different cultural "soils." The central inference in the book was that the same reform in the same country produced regional policy performance differences because of demonstrable differences in the civil involvement and civil competence in each region.

When he traveled back to the late-medieval origins of north-central Italy's city-state governments and to the simultaneous development in the south of an autocratic Norman regime, Putnam (1993) discovered the regional differences he had found "had astonishingly deep historical roots" (p. xiv). In both regions, he found analogies to the divergent civic capacities that he had identified in his data (pp. 121-123, 131). When he reached the 19th century,

statistical data became available that showed that “the same Italian regions [in the north] that sustained cooperatives and choral societies also provided the most support for mutual aid societies and mass parties” and that “citizens in those same regions were most eager to make use of their newly granted electoral rights” (p. 149). In the south, in contrast, “apathy and ancient vertical bonds of clientelism restrained civic involvement and inhibited voluntary, horizontally organized manifestations of social solidarity” (p. 149). Most important, he found that civic participation in the late 19th and early 20th centuries correlated strongly with his contemporary indices of civic capacity ($r = .93$) and with institutional performance ($r = .86$).

But there was a problem. When Putnam and his collaborators turned to causal inference about their findings, they never considered the impacts of state and social structure on civic capacity in the two regions. Every regime that governed southern Italy from the Norman monarchy to the unified government that took over in 1861 governed the region with a logic of colonial exploitation. Nor did southern Italy’s semicolonial status suddenly disappear with unification. The new Italian regions were installed in different civic soils in northern and southern Italy, but part of that difference was a public culture shaped by over a hundred years of political and administrative dependency on the central state (Pizzorno, 1971, pp. 87-98). There were unmeasured intervening variables between the civil and uncivil cultures that Putnam focused on that, for Putnam’s critics, were a more plausible explanation for the differences he encountered.

Correlational Logic Versus Process Tracing

The second major dimension in how paired comparison has been used is between the correlational strategy used in large-N analysis and the causal process models more familiar from single-case studies. Although the classical way of structuring a paired comparison begins with differences or similarities in outcomes and posits independent variables that are thought to explain these outcomes, causal process analysis relates variables to one another over time. Paired comparison of this type is what we can call “duel-process tracing.”

The Logic of Correlation

Despite the small number of cases involved, the logic of relating antecedents to outcomes is the same as the strategy of correlation. The researcher puts side-by-side sets of antecedent conditions—usually at the systemic level—with outcomes of interest, to infer causal relations between them. So far, this

sounds very much like large-N research, except for two factors, one negative and one positive:

- Negatively, the comparison of two cases lacks the degrees of freedom of large-N comparisons.
- Positively, it allows for and indeed demands a degree of intimacy and detail that inspires confidence that the connections drawn between antecedent conditions and outcome are real.

The Logic of Process Tracing

Although most applications—and many criticisms—of paired comparison assume the logic of correlation, process tracing has earned a revival among students of comparative politics (Brady & Collier, 2004; George & Bennett, 2004). In successive work, Bennett has argued for a merger between process tracing and a Bayesian approach to evidence. In the latter article, he argues that “the goal is to document whether the sequence of events or processes within the case fits those predicted by alternative explanations of the case” (2008, p. 705). The founding of a new section of the American Political Science Association (APSA) on “qualitative and multimethod research” has helped to diffuse these approaches.

The “step-by-step” approach to process tracing has been criticized as a form of story telling (Tilly, 2002). Stories, he argues, are an instinctive human way of ordering experience, but they do not necessarily aid in producing causal analysis. In a recent article, Caporaso takes a more conciliatory view, arguing that narratives can be broken down into mechanisms (2009). This is similar to the view taken by McAdam et al. (2001), who argue for breaking down large political processes (e.g., democratization, revolution, nationalist episodes) into their constituent mechanisms, defining mechanisms as delimited class(es) of events that alter relations among specified sets of elements in identical or closely similar ways over a variety of situations.

A number of important studies in comparative politics are based on the strategy of what I call duel-process tracing. For example, Bunce’s study of leadership turnover in the Soviet Union and the West (1981) showed that the leadership selection process in both countries produced similar “honeymoon periods” in which policy innovation was heightened and public spending rose. By observing these mechanisms and processes, Bunce specified the linkages between independent and dependent variables of interest. For Bunce, as for others who use paired comparison to identify what is key in political processes, “mechanisms seek to connect background factors (often structural) with a definite but more remote outcome” (Caporaso, 2009, p. 71).

Critics loyal to the logic of correlation sometimes point out that process tracing leaves a vacuum at the end of the analytical trail: For example, they want to know what are the outcomes of the mechanisms and processes that are so lovingly detailed by process analysts? There are two main answers to this charge:

First, laying out the mechanisms and processes that connect independent and dependent variables can show how independent and dependent variables are connected, as Caporaso argues (2009). A good example is Jeremy Weinstein's comparison of two types of violent civil war, in one of which civilians are more brutally and more widely targeted than in the other. Weinstein might have been satisfied by discovering this outcome and tracing it to structural preconditions. But he was more interested in the mechanisms that produced the different degrees of violence, one of which he called an "investment" strategy and the other a "consumption" strategy. In the cases he studied, although the first mechanism produced less violence directed against civilians, the second produced more indiscriminate violence (Weinstein, 2006).

The second, and more far-reaching, answer is that scientific causation does not always take the form of the explanation of specific outcomes. In an equally distinguished scientific tradition, the process itself is the outcome; accounting for it involves a logic of process tracing (Bunge, 1997; Tilly, 2002). An example is Collier and Levitsky's important article "Democracy With Adjectives" (1997). Properly seen, their goal was not simply to classify different kinds of democracies but to specify the different mechanisms that can drive the process of democratization and their interaction. If we want to know why a particular outcome emerged, we need to understand how it occurred.

Skocpol on Revolutions and Almost-Revolutions

Skocpol's *States and Social Revolutions* provides a useful example of both the strengths and the pitfalls of the correlational design in paired comparison. Skocpol posited two main systemic independent variables to explain the revolutions she studied in France, Russia, and China: external pressure and fiscal crisis. This was a largely structuralist model of explanation. It led her to give short shrift to factors internal to the revolution, as in her oft-quoted aphorism dismissing purposive action as a cause of revolution (1979, pp. 5, 14-18).⁶ She then briefly discussed two shadow cases, Japan and Prussia (pp. 99-10), in which social revolution did not occur, pointing to the absence in these cases of the antecedent conditions that, she argued, produced revolutions in her three main cases.

But in dismissing the importance of purposive action, Skocpol radically underspecified the political processes in both the three cases she studied in detail and even more so in her shadow cases. Between revolutionary situations and revolutionary outcomes lie a host of mechanisms and processes, some of them purposive, others environmental, and still others relational (Tilly, 2000). That the revolutionary process itself is not a worthwhile object of analysis is surely wrong, as many of Skocpol's successors have argued (Foran, 1994; Goldstone, 1998; Tilly, 1993).

*Samuels in Tokyo and Rome*⁷

Richard Samuels took a voyage of discovery every bit as wide geographically as Tocqueville's but narrower than Skocpol's in terms of the systems examined. In *Machiavelli's Children* (Samuels, 2003), he examined the variety of ways in which leaders mobilize fragments of the past in order to bring about change. Samuels carried out a loosely parallel narrative of two states—Japan and Italy—whose modern forms developed at the same time and in a similar international context: both were attempting to catch up to the early risers.

Despite the differences between the two countries (Samuels at one point recalls Neil Simon's *The Odd Couple*), he insists that "few nations have as many important common features":

Neither Italy nor Japan even existed as modern states when Great Britain and the United States embarked on their industrial revolutions. In both Italy and Japan late industrialization was accompanied by a groping ex-authoritarianism. And they paid the same price—devastation in the Second World War and subordinate roles in the new American world order. (Samuels, 2003, p. xii)

Both countries built centralized prefectorial systems of territorial governance; both would pass through authoritarian interludes that placed them in armed conflict with the democratic states of the West; and both democratized under the not-always-gentle hand of U.S. hegemony after defeat in World War II. Following brief periods of postwar cooperation between left and right, both were led for most of the succeeding half-century by anti-Communist catch-all parties of the center-right whose interests were deeply imbricated with the state (Pempel, 1990). Yet for most of this period, strong left-wing opposition parties persisted in both countries.

The two countries also followed similar economic trajectories. Both made astonishing economic recoveries from World War II, based on the exploitation of initially cheap labor, advantageous foreign trade positions, and

entrepreneurial innovation. And after catching up, both suffered recurring economic crises and a pattern of stop-and-go economic prosperity.

Samuels identifies “Machiavelli’s children”—the innovative leaders in modern Japanese and Italian history—with three elite “mobilizing mechanisms”—inspiring, buying, and bullying. By *inspiring*, he means the use of symbolic politics to control the way the collectivity is represented to itself; by *buying* he means the strategies of accommodation, trading, sharing, brokering, balancing, and co-optation that leaders adopt to purchase support; and by *bullying* he means using power to weaken, surround, and squeeze adversaries (Samuels, 2003, p. 9). These mobilizing mechanisms were used in different combinations to control the political agenda.

Samuels’ book shows how these three mechanisms combined in modern Italian and Japanese history in different ways to produce processes of political mobilization and control. After detailing the parallels in their 19th and early 20th century trajectories, he turns to their postwar developmental paths. These offered even more interesting intersections—especially in the “dominant party systems” that each developed (Pempel, 1990). Although both postwar ruling parties—the Japanese Liberal Democrats and the Italian Christian Democrats—were “first, and above all else, anticommunist,” neither party was especially “inspiring”: in fact, their anticommunism was compounded of a mixture of pleasing their hegemonic ally, fear for property, and out-maneuvering domestic opponents. Of “bullying” there was less than in the earlier periods, although the Italian police at first showed no hesitation in mowing down demonstrators and Japanese nationalistic and right-wing gangs were mobilized by the U.S. Occupation Forces and later by the LDP to suppress left-wing groups (Samuels, 2003, p. 189).

The major mobilizing strategy of both postwar elites centered around Samuels’ third mechanism—“buying.” He writes;

each “digested” its opponents with consummate political skill, generously distributing material benefits, enticing the extremes to abandon anti-system views, and establishing themselves a popular image as indispensably sturdy democrats and friends of the American protector. (Samuels, 2003, p. 186)

Samuels’ elite mechanisms avoid the cultural determinism that has dogged accounts of both Italian and Japanese politics since the end of World War I. But the continued dominance of the Liberal Democrats until 2009—compared with the collapse of Christian Democracy in Italy—is hard to understand in the absence of the form of the two states.

The attractions of Samuels' mechanism-based account may also have left Samuel unimpressed with the differences in the Japanese and Italian states. If Japanese leaders deployed a uniform "developmental ideology," can this be detached from the more centralized, more cohesive, and more disciplined Japanese state—one which became the model for the "developmental state" (Johnson, 1982)? And if Italian leaders failed to tame the forces that shaped economic development, can that be independent of the fact that their state was less centralized, less cohesive, and less disciplined than the Japanese one (Pempel, 1998, pp. 37-41)?

The variations in these four paired comparisons are legion. To summarize, Tocqueville un-self-consciously used a most-different system design but could not erase French centralization and revolution from his mind as he traveled through the early United States. Putnam moved to a most-similar systems design to uncover the key independent variable that could explain the different outcomes of the regional reform in the two main regions of Italy. Skocpol chose three cases of social revolution in which the same or very similar antecedent variables combined and showed that they had very similar outcomes. Her paired comparison indicated that the logic of correlation can strengthen arguments from similar cases. Finally, Samuels used the similarities in Japan's and Italy's historical development to provide a common canvas on which to draw out the differences in the mix of mechanisms he found in their political processes.

As I hope to have shown in this brief overview, there is no one best way of carrying out a paired comparison, just as there is no one best way of doing social science in general. Paired comparison is not simply a degenerate form of large-N analysis, nor is it only a "case study plus one." It is a distinct analytical strategy for working through complex empirical and historical materials using the leverage afforded by the differences and similarities of comparable cases. But what is distinct about it? And what are its advantages and pitfalls?

The Distinctiveness of Paired Comparison

Some of the reasons for the widespread use of paired comparison are properties it shares with case studies in general. First, it provides an **intimacy of analysis** that is almost never available to large-N analysis. Second, it draws on—and indeed insists on—deep background knowledge of the countries being examined. Third, it facilitates what Brady and Collier call "causal-process analysis," in contrast to the "data-set observations" that are the basis of correlational and regression analysis (Brady & Collier, 2004, p. 277).

But paired comparison is distinct from single-case studies in several ways. Its distinctiveness can be understood through an analogy with experimental design. It is similar to experimentation in its ability to compare the impact of a single variable or mechanism on outcomes of interest. Of course, an experimenter has the ability to randomly assign subjects to treatment and control groups, making both groups probabilistically equal on all variables other than the experimental one. All the pairing comparativist can do this respect is to attempt to carefully match the confounding variables that he or she knows about (but not ones that do not come to mind). In addition (see below), given the small number of cases used it is difficult or impossible to control for more than a few factors.

However, paired comparison does have an analytical baseline, eliminating the possibility that the dependent variable can have occurred even in the absence of the independent variable, thus significantly increasing the inferential power of the design over the single-case study. And by permitting dual-process tracing, it reduces the possibility that a supposed determining variable is as critical as it might seem from a single-case study alone. Finally, as Becker (1968) argued, paired comparison can add confidence in a “building-block strategy” that moves from a single-case to a multicase analysis. Katzenstein’s (1984) comparison of Switzerland with Austria illustrates all three of these properties.

Katzenstein, Corporatism, and Compensation

In the late 1970s a number of scholars who had noticed the frequency of political economic cooperation at the elite level of European systems coined the terms *neocorporatism* and *liberal corporatism* (Lehmbruch & Schmitter, 1982). Because most of the cases involved were either social democratic (e.g., Sweden) or were governed by alternately by Social and Christian democratic parties (e.g., the Netherlands), it seemed logical to see neocorporatism as a product of domestic partisanship. Katzenstein’s dual comparison of Switzerland and Austria broadened the scope conditions of the theory and pointed to the importance of an internal mechanism that was shared among a number of smaller European democracies regardless of their internal politics. This pointed to their deep involvement in international trade and to an internal mechanism that won the support of all major actors for the compromises necessary for economic concertation.

At first glance Austria and Switzerland looked very different. Austria looked like a social democratic-oriented welfare state, whereas Switzerland resembled model capitalist system with a small welfare state and a conservative-leaning political elite. Both were deeply involved in and dependent on the

international economy, which made them comparable. But what was the internal mechanism that translated international involvement into concertation? From his close duel-process tracing, Katzenstein observed that regardless of their internal partisan tendencies, each provided more resources to the politically less powerful interest group in each system (e.g., business in Austria and labor in Switzerland) than that group would have received based on its political clout alone. Compensation kept the minority player in the game. Process tracing made it possible to go beyond the simple bivariate correlation that others had traced between international trade and domestic corporatism.

I see three additional reasons for the widespread attraction of paired comparison in comparative politics:

- **Correcting generalization from single cases:** Many scholars use paired comparison as an analytical wedge to complement or contrast a case they know well or think they do. (In fact, one of its serendipitous virtues is that it helps country experts understand their primary cases better.) For example, when Chalmers Johnson discovered a pattern of peasant nationalism behind the Chinese struggle against Japanese invaders, he turned to the Yugoslav partisan movement to determine how far his findings could travel (Johnson, 1962, chap. 6).
- **Assessing the influence of institutions:** The paired comparison of different political systems allows analysts to use differences in institutional form as a variable to demonstrate the sources of intrasystemic behaviors. Just as Italy's common institutional reform was the critical hinge on which Putnam's comparison of northern and southern Italy turned, institutional contrasts were central to Juan Linz's and Arturo Valenzuela's comparisons of presidential and parliamentary systems (1994).
- **Creating an intermediate step in theory building:** A productive use of paired comparison is as an intermediate step between a single-case study, which suggests a general relationship, and a multicase analysis that tests or refines a theory. This use of paired comparison seems to fit with what Evan Lieberman had in mind with his concept of "nested comparison" (2005). A good example in which quantitative and qualitative methods triangulate can be found in the literature on postconflict peacemaking. Large-N studies show that the power-sharing arrangements that international organizations and Western states often press upon countries emerging from civil war are often good at ending internal conflicts but do not produce durable democratization (Jung, 2008). But statistical correlations on

their own tell us little about the mechanisms that produce democratic reversals and require detailed process tracing, as in the paired comparison of Bosnia and Mozambique carried out by Jai Kwan Jung (2008, chap. 5).

Why Two?

If paired comparisons have so many advantages, the sympathetic critic may ask, why stop at examining two cases? Why not three...four...or x cases? The answer, I think, is that the move from single-case to paired comparison offers a balanced combination of descriptive depth and analytical challenge that progressively declines as more cases are added. The moment we go from one case to two, I would argue, we are in the realm of hypothesis-generating comparative study, while also enabling ourselves to examine how common mechanisms are influenced by the particular features of each case; as we increase the number of cases, however, the leverage afforded by paired comparison becomes weaker, because the number of unmeasured variables increases.⁸ This is essentially what Howard Becker (1968) argued in his building-block strategy. But it is paired comparison that gets Becker to the theoretical argument, with additional cases either providing additional evidence or pointing to a more refined explanation of the findings from the original pairing. This is even the case in some multicase comparisons, in which the analytical work is done by paired comparison of 2×2 cases, for example, as in Kathleen Thelen's *How Institutions Evolve* (2004).

Pitfalls of Paired Comparison

These advantages have made paired comparison a favored tool of many comparativists, but it is not without its problems. Depending on how it is used, it carries a number of pitfalls. The most important are insufficient degrees of freedom, nonrepresentativeness, atheoretical case selection, and ignoring scope conditions.

Insufficient Degrees of Freedom

The most common critique of paired comparison is similar to the criticism made of case studies in general: the absence of enough degrees of freedom to reliably choose among alternative explanations for outcomes of interest. Mill's "method of difference" is the major technique used to limit unmeasured

variance in paired comparison. As it is laid out in Gerring's (2007) book on case studies, Mill's method assumes that observable variables will exhaust all the possible causes of an outcome of interest and that a single difference among those variables can be identified as the sole cause of that outcome. But this assumes that all relevant variables can be observed, that there is only one difference among these variables, and that the correlation between this difference and differences in outcome can confidently be regarded as causal. These assumptions are heroic, to say the least (Little, 1998).

Nonrepresentativeness

Nonrepresentativity is a problem for all small-N comparative analysis but is particularly worrisome in paired comparison. In traditional area studies comparisons, cases were often chosen because of their familiarity or geographic proximity to one another, ignoring potential comparisons of cases that are either unfamiliar or geographically "outside of one's area." That left many theoretically interesting comparisons unexplored; some of them, like Johnson's comparison of China and Yugoslavia, have already been mentioned. Two others, Bunce's comparisons of leadership succession in the USSR and the United States, and Samuel's of Italy's and Japan's political development, were examined earlier.

The pitfall of nonrepresentativity was most famously pointed to by Barbara Geddes in her critique of Skocpol's *States and Social Revolutions* (Geddes, 1990). Geddes argued that with a few cases on the extreme end of a continuum from nonrevolution to revolution, Skocpol could not legitimately claim that her independent variables of interest were in fact connected to the social revolutions she had studied (Geddes, 1990, pp. 142-143).

Atheoretical case selection

Atheoretical case selection was also common in traditional area studies. Countries that have gone through similar experiences (e.g., the losers in World War II), which go through similar phases at the same time (e.g., as parts of "waves of democratization"), or are simply in the same part of the world are obvious subjects for paired comparison. "Find a second case" is sometimes the casual advice we hand out to graduate students when they go to the field; less often, we provide them with advice about how to select cases so that their findings cannot be dismissed by critics as no more than the result of the noncomparability of their cases.

Ignoring Scope Conditions

Waves of theoretical innovation in the social sciences often produce efforts to expand the scope conditions of a theory. This is a fruitful exercise but it can easily produce the extension of theories beyond their feasible range.⁹ For example, when Ronald Inglehart developed his important theory of postmaterialism, it was seen as an effect at the individual level of changes common to Western countries that had enjoyed a high level of prosperity during the economic “miracle” of the 1950s and 1960s (Inglehart, 1977). Armed with the world values study, it was natural for Inglehart and others to apply the methods and the model to other parts of the world. When they did so, it emerged that “postmaterial” attitudes are widespread in countries that it would be difficult to see as advanced industrial societies (Inglehart, Basáñez, Díez-Medrano, Halmann, & Lujkx, 2004). This is not to question the importance of Inglehart’s findings; it is only to point out that extending the original theory to interpret them goes well beyond the scope conditions of the theory.

Digging Out of the Pit

These four pitfalls are not unique to paired comparison. As in most methodological discussions, plausible responses can be offered to each of them:

Degrees of Freedom

Although some scholars regard the degrees of freedom problem as fatal, I do not agree. Intensive case studies produce multiple observations and paired comparison doubly useful ones. Consider Tarrow’s (1977) analysis of Italian and French local elites: There were multiple observations in that study converging on the finding that French mayors are primarily part of the administrative pyramid, whereas Italian ones are fundamentally partisan actors. But of course, this places a heavy burden on case selection and calls for vigorous attention to problems of unmeasured variables and the limited diversity of most political variables (Lijphart, 1975; Ragin & Sonnett, 2005).

Nonrepresentativity

Of course, single paired comparisons lack the capacity to impose controls by adding new units to the comparison. But as Harry Eckstein long ago wrote (1975), the function of case studies is not always to represent larger

universes; they may be “crucial cases” to demonstrate a theory, or they may be deliberately chosen because they are outliers. The paired comparison of a case that lies on a regression line with one that is far off that line can frequently teach us more about both mainstream and deviant cases than a comparison of many cases scattered across a regression matrix.

Atheoretical Case Selection

Much of area study is based on countries that are close to one another or familiar to the researcher, but this type of area study is no longer as common as it once was (Hall & Tarrow, 1998). More typically today, area studies scholars choose countries for paired comparison because they are comparable but exhibit different processes or outcomes, for example, as in Bunce’s (1999) comparison of violent and nonviolent routes out of state socialism or in McAdam and colleagues’ comparison of revolution, democratization, and nationalism in widely spaced systems (2001, chapters 8-10).

Ignoring Scope Conditions

Expanding the scope conditions of a theory too far is certainly a problem for paired comparison, but it is a problem for general comparison as well. The solution for large-N comparisons is to examine outliers within the data set, whereas the solution for paired comparison is the addition of third, fourth, or *n*th cases that deliberately reverse the value of the independent variable that appeared to explain the outcomes of the original pair. Paired comparison is a method that can easily be extended, examining whether the scope conditions within which a theory is developed appear to work in other research sites. A classical example was how Juan Linz developed the concept of authoritarianism (1975). Linz was unhappy with the Cold War typology of democratic and totalitarian states. By adding Spain to the nondemocratic spectrum of states, he pinpointed its differences from the classical totalitarian model—mainly its limited pluralism—and developed the concept of authoritarianism that gave rise to a rich literature of case studies, paired comparisons, and large-N studies.

Conclusions: No Magic Bullet

This has not been a research monograph or even a research agenda, and one should hesitate before offering “rules” for paired comparison to the wide range of scholars who use it. So I will limit myself to suggesting four ways through which paired comparison can be systematized and improved: increasing

methodological plurality, progressively testing scope conditions, localizing theory, and combining correlational with process-tracing methods.

Expanding Methodological Plurality

Because the case study tradition mainly grew up through the use of qualitative and historical methods, it has sometimes been associated only with “soft” methods of analysis. That has allowed advocates of “hard” methods to dismiss findings that result from paired comparison as mere story-telling and led those who use historical or narrative forms of analysis to embrace it to the exclusion of other methods. But paired comparison can gain analytical leverage from a variety of methods that allow analysts to triangulate on the same research questions from different angles (Tarrow, 2004). Paired comparison is methodologically rich and diverse.

A number of pairing comparativists have effectively combined quantitative and qualitative methods of comparison. Cleary and Stokes (2006), Putnam et al. (1993), Tarrow (1967, 1977), Weinstein (2006), and Wood (2000) have deliberately turned a battery of methods on their research questions. Wood’s comparative study of two regions in El Salvador is a good example; she used surveys, archival materials, interviews, ecological analysis, and agrarian property mapping to show how and where insurgency emerged (Wood, 2002). Comparativists are even experimenting with quasi-experimental designs, in which survey respondents are divided into a subject group exposed to a stimulus and a control group which is not (Gibson, 2008).

In a real departure for paired comparison, we are beginning to see creative uses of matching in concert with statistical methods. For example, in biostatistics, Rosenbaum and Silber argue, “matching facilitates thick description of a handful of cases, and such scrutiny of cases benefits statistical studies” (2001). Abadie and Gardeazabal use “synthetic controlled” matching methods to estimate the effects of such factors as terrorism, public policy innovations, and other changes on outcomes. They created a simulated Spanish region without terrorism and estimated that GDP declined about 10 percentage points in the Basque country relative to a simulated region without terrorism (Abadie & Gardeazabal, 2003). More recently, Abadie and his collaborators have applied similar methods to the effect of a tobacco control program in California and to the economic impact of German unification (Abadie, Diamond, & Hainmueller, 2007). As the traditional wall between quantitative and qualitative methods breaks down we should see more and more use of paired comparison as a tool together with statistical work in comparative politics (Brady, Collier, & Seawright, 2006; Caporaso, 2009).

Progressively Testing Scope Conditions

Paired comparison sometimes appears to be an iron cage in which the cases studied become the determining sites to define and limit the variables inducted for analysis. We saw an example of the perils of such a procedure in Tocqueville's determination to see the United States as the mirror image of France. But no single pair of cases exhausts all potential variables of interest. The adventurous researcher will extend generalizations emerging from an initial paired comparison to additional research sites—what Richard Samuels aptly calls the 3-C strategy (1999).

“It ain't easy,” as Samuels eloquently shows. To imagine how such a procedure might affect theoretical conclusions, imagine a Tocqueville who returned to earth today and, with the aid of statistical methods not available to him in the 1830s, added a third case to his paired comparison: let us say the France of the Fifth Republic. He would find a state that is still quite centralized but in which associational capacity is high—by most accounts, comparable to that of other European countries. Yet France today is as established a liberal democracy as the United States, so the causal links Tocqueville imputed from centralization to associational capacity and from there to democracy would need to be questioned.

A successful example of the testing of scope conditions through progressive paired comparisons can be seen in the ongoing research of Valerie Bunce and Sharon Wolchik on the electoral “revolutions” in east central Europe, the Caucasus, and central Asia (2006a, 2000b). The strategy of attempting to overthrow semi-authoritarian rulers by exposing and then contesting corrupt electoral practices through mass protest was first used in Slovakia in the late 1990s; it was then used as the cornerstone of the overthrow of Milosevic in Serbia in 2000, before diffusing to the Caucasus and central Asia. As the strategy diffused from its origins in the more advanced nations of east central Europe to the Balkans, the Caucasus, and then central Asia, it was less and less successful. This extension of scope conditions permitted Bunce and Wolchik to zero in on the values that appeared in the early risers but are missing in the latecomers.

Localizing Theory

Paired comparison affords researchers the possibility of what Tilly calls “individualizing comparison”—for example, clarifying what is distinctive about a particular case's dynamics and trajectory (1984). Tilly used paired comparison in this way in his book on the Vendée rebellion in the west of France during the

revolution (1964). In contrast to most historians, who had seen the rebellion as the result of religion and legitimacy, Tilly saw urbanization as the fulcrum on which the counterrevolution turned. He used a paired comparison of two adjoining areas in western France to gain analytical leverage.

Tilly had to use mainly archival methods to localize his theory of the connection between urbanization and republicanism in revolutionary France. But Putnam and his collaborators (1993) were able to use statistical methods to carry out a similar localizing exercise. When they disaggregated the large regions of northern and southern Italy into smaller statistical units, they found support for their theory at the sub-regional level that civil competence is related to policy performance (chap. 4). The replication of large scale hypotheses at smaller scales through paired comparison added strength to the findings of both Tilly and Putnam. It localized theory as well as strengthening it.

Combining Correlational with Process-Tracing Methods

There is an unfortunate tendency in comparative politics to choose a particular way of doing research because it seems the One Best Way to do research. As readers will already have concluded from the thrust of this article, this is not my view. But much more difficult than calling for methodological pluralism is to solve the problem of how to combine different logics of comparative research.

Consider the association between membership in social networks and the willingness to participate in collective action (Diani & McAdam, 2003; McAdam & Paulsen, 1993). It is a correlation that has been observed in so many different correlational studies that it comes close to achieving the status of a sociological law. But no matter how high the correlation between social network membership and the willingness to mobilize, without understanding the mechanisms that produce it, its outcomes will be indeterminate. For example, it may be the result of social control, of physical propinquity, of solidarity, or of ideology. Only by going inside the process of mobilization to specify its connective mechanisms can we understand how the chain of causation operates. Yet advocates of statistical correlation and enthusiasts for process tracing are often indifferent to one another's contributions.

Methodological pluralists need not despair. Consider the civil war literature of the last decade. As is well known, there was a surge of large-N quantitative studies of civil conflict from the early 1990s to the turn of the century (Collier & Hoeffler, 1998; Fearon & Laitin, 2003; Gurr, Harff, Marshall, & Scaritt, 1993). Statistical data arrayed from official sources for literally hundreds of civil war cases demonstrated a number of significant

correlations for civil war outbreak (e.g., the presence of extractable resources and the existence of mountainous territory). But the large-N tradition left open a number of questions that were not easily susceptible to quantitative analysis (Tarrow, 2005). The quantitative civil war literature appeared to be playing itself out.

But just at that moment, Paul Collier and Nicolas Sambanis, who had done some of the best quantitative work, brought together a number of country and regional specialists to test some of the main conclusions that had come out of the earlier wave of studies with a series of case studies, including the method of process-tracing paired comparisons (Collier & Sambanis, 2005; Humphreys & ag Mohamed, 2005). Their findings are paving the way for the next wave of large-N studies of civil wars, including more refined measurement of the escalation of contention from social protest to organized violence (Sambanis & Zinn, 2005).

Process-based and correlational studies are best seen as complements, not as competitors, on the long hard road to scientific knowledge (Caporaso, 2009). So are most-different and most-similar system designs. Only by exploiting to the full and varied potential of paired comparison will the strategy of paired comparison, which has been much used but little thought about, take its rightful place in the armamentarium of comparative politics.

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Notes

1. For truth in advertising, I confess that through four single and jointly authored books, I failed to develop a theory of paired comparison. See Tarrow (1967), Tarrow (1977), Blackmer and Tarrow (1972), and McAdam et al. (2001).
2. For a large number of references to the use of paired comparison on which this article is based, visit <http://falcon.arts.cornell.edu/Govt/faculty/Tarrow.html>.
3. In an earlier book, Gerring gives more attention to paired comparisons in the context of a discussion of most-similar and most-different case analysis (2001, pp. 208-214).
4. I use Gerring's lucid definition of most-different systems analysis rather than Przeworski and Teune's more opaque one because it will be understandable to the ordinary reader (cf. Przeworski & Teune, 1970, pp. 34-39).
5. Although there is a superficial resemblance between Mill's methods of agreement and difference and Przeworski and Teune's most-similar and most-different systems, they are actually somewhat different. Mill was trying to devise methods to look at similarities and their outcomes regardless of the proximity or distance between the objects of analysis; Przeworski and Teune were distinguishing the distance between the objects being compared. For an innovative application of most-similar systems analysis to European public policy, see De Meur, Bursens, and Gottcheiner (2006).
6. Skocpol (1979) writes, "The [purposive] image strongly suggests that revolutionary processes and outcomes can be understood in terms of the activity and intentions or interests of the key group(s) who launched the revolution in the first place" (p. 17).
7. This analysis is based on Samuels' book, *Machiavelli's Children* (2003), and on an earlier article, "Tracking Democracies: Italy and Japan in Historical Perspective" (1998). For his methodological reflections, see Samuels (1999).
8. This argument is close to that of Peter Hall (2003), who has argued for a closer fit between the ontology and the methodology of paired comparison. I am grateful to an anonymous reviewer for pointing out this convergence between Hall's position and my own.
9. I am grateful to Gary Goertz for pointing this out in his comments on an earlier version of this article.

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Bio

Sidney Tarrow (PhD, Berkeley, 1965) is Maxwell M. Upson Professor of Government and Professor of Sociology at Cornell University. Tarrow's first book was *Peasant Communism in Southern Italy* (Yale, 1967). In the 1980s, after a foray into comparative local politics (*Between Center and Periphery*, Yale, 1978), he turned to a reconstruction of Italian protest cycle of the late 1960s and early 1970s, *Democracy and Disorder* (Oxford, 1989). His recent books are *Power in Movement* (Cambridge, 1994, 1998), *Dynamics of Contention* (with Doug McAdam and Charles Tilly, Cambridge, 2001), *Contentious Europeans* (with Doug Imig, Rowman and Littlefield, 2001), *Transnational Protest and Global Activism* (ed., with Donatella della Porta, Rowman and Littlefield, 2004), *The New Transnational Activism* (Cambridge, 2005), and (with the late Charles Tilly) *Contentious Politics* (Paradigm, 2006). He is a fellow of the American Academy of Arts and Sciences and has served as program co-chair of the American Political Science Association Annual Convention, president of the Conference Group on Italian Politics, and president of the APSA Section on Comparative Politics. He is currently working on war-making, state building, and human rights.