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Theory and Method in Comparative Research: Two Strategies*

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Abstract

We examine the comparative strategies of Durkheim and Weber and link them to specific presuppositions. While both are compatible with goals of explanation and generalization in sociological analysis, they use different types of explanation and different degrees of generalization to produce variable-based (Durkheimian) and case-based (Weberian) studies. Several authors (e.g., Kapsis; Smelser, b) suggest that these two strategies converge. We show that these strategies are neither congruent nor convergent in their (1) units of analysis, (2) conception of causality, (3) conception of adequate explanation, or (4) logic of analysis. We examine contemporary comparative studies and trace lines of filiation between them and the strategies of Durkheim and Weber. Finally, we suggest how these strategies can be combined in complementary ways to take advantage of the unique strengths of each.

One of the few priorities Durkheim and Weber shared was to establish a balance between competing claims of complexity and generality in sociological analysis. They both saw comparative research as the means to do this because such research avoided problems associated with older styles of inquiry. Comparative analysis separated sociology from traditional historical research with its atheoretical attention to detail; it also separated sociology from social philosophy and the philosophy of history with their emphasis on sweeping generalizations (see Zaret, a).

These concerns shape Weber's conception of sociology as a science of historical reality. According to Weber, sociology uses ideal types to enable limited generalization about historical *divergence* (see Zaret, b). Limited

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generalizations point to different patterns of process and structure in history, but the scope of such generalizations never approaches that of natural scientific laws. Ideal types thus occupy a middle ground between the uniqueness of historical events and the generality of laws. Comparison between ideal types and empirical cases identifies adequate causes and aids understanding of divergent historical developments. Central to this methodological strategy is Weber's conviction that social reality is sufficiently complex as to be unknowable in the absence of theoretical interests that guide construction of one-sided type concepts.

Durkheim no less than Weber acknowledged that social life is complex (h, I:161) and that "scientific thought . . . could never exhaust reality" (i, 150). While this led Weber to comparative studies using ideal types, it led Durkheim to comparisons that emulated laboratory experiments in natural science. To be a science, Durkheim argues, sociology must transcend a preoccupation with detail and uniqueness. This preoccupation leads to conceptual nominalism and methodological individualism, both of which he rejects as antithetical to a science of society (see Gieryn). But grandiose generalization is equally unacceptable to Durkheim: it grossly simplifies reality in order to subsume it under a universal law or philosophical verity. A different strategy recognizes that "between the confused multitude of historic societies and the single, but ideal concept of humanity, there are intermediaries, namely, social species" (d, 77; see also e; h, III; i). Comparative analysis presumes the existence of social species, that is, discrete types of societies. The "comparative method would be impossible, if social types did not exist, and it cannot be usefully applied except within a single type" (a, 9; see also h, I:196, III:29).

Comparative analysis is central to Durkheim's and Weber's vision of sociology because it provides solutions to one of its constitutive problems: reconciling competing claims of complexity and generality in social research.¹ Their solutions use different analytical devices, ideal types and social species, to enable systematic comparison. Yet neither regarded his solution as self-evident. They are embedded in theoretical contexts which have profound methodological implications. Weber's *epistemological* analysis reconciles complexity and generality by showing that they serve complementary purposes in ideal types. Durkheim reconciles the same set of competing claims in an *ontological* argument about social species that far surpasses simple assertions about the uniformity or diversity of social organization.

For Weber, generalization pushed to the extreme leads to nomothetic abstractions which, because of their abstractness, offer little help in explaining historical divergence. Durkheim was, of course, not opposed to the abstractions of scientific laws but to those of philosophy. Yet both regarded comparative research as the *via media* between complexity and generality that would establish the academic credentials of sociology. But

the nature of this middle way, and the goals toward which it led, were different.

This article examines Durkheim's and Weber's comparative strategies and the different theoretical interests which implicate their respective methodologies, statistical and qualitative-historical. Our general argument is that these are antithetical yet complementary strategies of comparison. Both are compatible with goals of explanation and generalization, but they produce different types of explanation with different degrees of abstraction. The two strategies are neither convergent nor congruent in their (1) units of analysis, (2) conception of causality, (3) conception of adequate explanation, and (4) logic of analysis. But as we demonstrate in the last part of this article, methodological features of each strategy can be combined in comparative research designs in complementary ways. Until now, this has been hampered by widespread misunderstanding of the relationship between statistical and qualitative-historical methods of comparison and their respective theoretical bases.

Our discussion of theory and method in comparative research differs in several ways from previous discussions. First, we link statistical and qualitative-historical comparisons to theoretical interests in different types of explanation. Receptivity to this idea broadens understanding of methodological issues and offers an alternative to false contrasts between statistical and qualitative-historical methods that depict the former as explanatory and the latter as descriptive.

Second, we show that the application of correlational methods to cross-societal data presupposes specific theoretical interests. Other theoretical interests lead to different comparative strategies. Statistical methods of comparison, in our view, are not theoretically neutral, nor are qualitative-historical methods a less desirable proxy for them. Other views of comparative research ignore or minimize the differences we discuss: comparative research² appears as the application of correlational methods to cross-societal data, which poses specific methodological problems of sampling, measurement, interview design, and so forth.

Such a preemptive view of comparison as correlation appears in the suggestion that "Durkheim was the first to seriously use the comparative method correctly in the scientific sense" (Collins, 529). Others have turned to both Durkheim and Weber, but argue that a methodological convergence between them leads in the direction of multivariate analysis (Kapsis; Smelser, b). Still others argue that there are different strategies of comparison, but that qualitative methods which only *mimic* statistical methods are dictated by the nature of historical data (Skocpol and Sommers; Sommers). Our disagreement with these arguments will become evident.

Finally, our discussion of theory and comparative method clarifies some prevalent misunderstandings about Durkheim and Weber. Of course, theoretical differences between them are well known. Less satisfactory is

current understanding of the bearing of these differences on comparative research. Our remarks systematically relate Durkheim's and Weber's comparative methods to their respectively consistent and compelling theoretical rationales.³

We begin by examining these strategies as they emerged in Durkheim's and Weber's work. Then we discuss the status of these strategies in contemporary research. Finally, we consider ways of combining these strategies that take advantage of the unique strengths of each.

Durkheim, Species and System

Durkheim's comparative strategy begins with the idea of social species. Discrete species of societies exist and can be classified objectively, without the aid of subjective theoretical interests, because their attributes are empirically evident. In *The Rules of Sociological Method* Durkheim states that species attributes are more permanent than mere "historical phases," such as those defined by different economic systems (e.g., craft industry, manufacturing): "A species *defines itself* by more constant characteristics" (d, 88n; emphasis added) than those of different economic systems. Species are thus types of societies whose attributes are extremely durable over time.

To justify this position, Durkheim uses biological analogies. Species of society exist "for the same reason that there are biological species" (d, 87). Finite combinations of the basic anatomical unit, the cell, differentiate biological species. The social equivalent of this anatomical unit is "the horde" (d, 82; see also c) out of which arise aggregations ranging in complexity from the clan to "polysegmental societies doubly compounded" and so on. The finite number of aggregations establishes the objectivity of species: "the gamut of possible combinations of social segments is finite; most of them will necessarily appear repeatedly; therefore we must conclude that social species exist" (d, 84).⁴

Although this discussion appears archaic and far-removed from contemporary methodological issues, it contains a number of modern presuppositions. That different species are objectively distinct and finite presupposes that their internal relations are determined by their mode of aggregation, that their attributes *emerge* from the combination of their component parts. The assumption that empirically distinct species exist due to different modes of aggregation relies on the concept of hierarchical emergence (see Nagel). In all phases of Durkheim's work (c, 363-4; d, xlvii-viii, 102-4; f, 56-60; g, 26), he defends this doctrine which derives from Comte and leads to modern systems theory (see Lenzer).

This conception of social species is compatible with systemic conceptions of society (e.g. Buckley; Dubin). The doctrine of hierarchical emergence in Durkheim appears today as an axiom of systems theories in soci-

ology: relational properties are emergent properties and must be understood holistically. Relations among variables are largely determined by their systemic context (with due allowance for exogenous forces). For this reason, functional explanations are preferred because they are holistic (Battista) and portray relational properties (Ball; Teune) as emergent features of the system in which they are found.⁵

Modern systems theory thus reflects Durkheim's stipulation that institutional components of society are necessary effects of its mode of aggregation (cf. Dubin). This is somewhat concealed by his reliance on biological analogies to explicate systemic notions of causality. For example, Durkheim argues that a history of institutions is to a narrative chronology of events as the mode and functioning of an organ is to the everyday life of an individual.⁶ The point is not that Durkheim used organic analogies, but that he adopted biology's metatheoretical assumptions because he thought that hierarchical emergence, holistic explanation and classification applied to sociology as to biology (d; see Merton, 102).

Permanent Causes and Correlations

Durkheim's assumptions about emergent properties, holism and classification led him (d) to attach great importance to causes that are *internal* to the objects of analysis, to permanent causes (Ragin, a). This is crucial for his comparative strategy because it implies that "the determining condition of social phenomena is . . . the very fact of association." Durkheim refers to this fact of association as the "social milieu," "internal environment" or "internal constitution" of society in which "the first origins of all social processes of any importance should be sought" (d, 112-3). Properties of the social milieu are permanent causes that act to maintain the life of the system against internal strains and external pressures.⁷ He writes:

it is . . . with relation to this same [social] milieu that the utility or . . . function of social phenomena must be measured. Among the changes *caused by the social milieu*, only those serve a purpose which are compatible with the current state of society, since the milieu is the essential condition of collective existence (d, 119).

Examined critically, the milieu appears in Durkheim's work as a theoretical vanishing point, a postulated causal nexus invoked to account for the response of subsystems to internal or external change in the interest of system maintenance (see Zaret, c).

The causal efficacy of the social milieu is the *sine qua non* of Durkheim's theoretical presuppositions about social research. He argues that "if we reject this type of cause, there are no concomitant conditions on which social phenomena can depend" (d, 117). No emergent properties, no permanent causes, no study of concomitant conditions, no natural sci-

ence of society—this train of thought led Durkheim to adopt and defend assumptions associated today with systems theory.

The assumption that permanent causes are theoretically the most significant has explicit methodological implications for comparative research. Because they are permanent, they are attributes of the unit. As attributes, they cannot be removed for experimental purposes. Because they cannot be removed, it is impossible to determine directly, as in some natural sciences, the true effect of any given property. The property is permanent, and truly experimental designs cannot be used to analyze it.

To surmount this problem Durkheim recommends studying concomitant variation as an "indirect experiment" (d, 125; see also h, III). This view of concomitant variation derives from John Stuart Mill's *A System of Logic* which advocates the method of concomitant variation to study "the laws of . . . permanent causes [whose effects are] impossible either to exclude or to isolate" (a, 398). Durkheim read this work and concluded that concomitant conditions of a particular milieu can be found by looking for parallelisms in series of values of two or more variables. If parallelism is established in many cases, then causal relations must exist between the variables (d).

For Durkheim, concomitance is evidence of permanent cause. He criticizes Mill who dismissed the importance of concomitant variation for social science. Mill (b, 879–86) argues that social reality provides many examples of plural and convergent ("chemical") causation. Because such phenomena present no necessary link between variation in cause and effect, the method of concomitant variation could not be used. In opposition to Mill, Durkheim rejects as unscientific the idea that an effect could have more than one cause. Concomitance is evidence that phenomena are connected in a necessary and permanent manner: "constant concomitance is a law in itself" (d, 131).⁸

These theoretical assumptions about systems and causes guide Durkheim's comparative strategy. This strategy seeks to ascertain permanent causes, conceived as attributes of the units, by the method of concomitant variation. The method is thought to be applicable only within species. Cross-species analysis should be used cautiously if at all (a). For comparable units, observed correlations indicate permanent causes:

to discover the laws of nature, one need only make a sufficient number of comparisons between the various forms of a given thing. In this way the constant, unchanging relations expressed in the law are distinguished from those that are merely ephemeral and accidental (e, 511).

The presumed correspondence between observed correlations and permanent causes underlies Durkheim's confidence in his empirical findings. The validity of these findings rests not merely on his application of correlational methods to appropriate data, but, more importantly, on sev-

eral theoretical assumptions that attach special importance to observed correlations.

Durkheim and Contemporary Cross-Societal Research

Contemporary applications of statistical methods to cross-societal data follow Durkheim's comparative strategy. Researchers are not always aware of this. Theoretical presuppositions that inform this strategy typically remain unstated. In this section we identify, in modern statistical strategies of comparison, presuppositions about emergence, classification and permanent causes with regard to: (1) systemic conceptions of units, (2) permanent causes, (3) concomitant variation as a logic of analysis, and (4) functional propositions about patterns of relations among abstract variables as adequate explanation.

1. The individual, the group, society, and intersocietal networks have been units of analysis in statistical analyses of comparative data. Most of these analyses use either individual-level data drawn from several nations or aggregate national level data (see Armer and Grimshaw; Elder; Kobben; Tomasson). Many comparativists tacitly agree with Grimshaw that "to raise the issue of what constitutes a meaningful unit for comparative analysis is to open the lid of a Pandora's box" (10). A disinclination to confront the issue of units has been observed by many commentators (e.g., Armer; Czudnowski; Frey; Ragin, c; Rokkan; Smelser, b; Vallier; Zelditch).

Although Durkheim's classification of societies as species is not seen today, there is a striking similarity between it and the status of units in modern statistical strategies of comparison: both assume them to be discrete systems that can be categorized into populations of comparable observations. This is especially evident in comparative studies of modernization, as several critics have noted (e.g., Bendix, b; Bendix and Roth; Eisenstadt and Curelaru, 19, 24-7).

Statistical strategies of comparison generally begin with specification of observational units, which are conceived as a population from which the investigator must sample. Investigators assume that their units are autonomous and constitute independent observations. Patterns of relations among variables can then be treated as emergent features of the units that reflect permanent causes. Seldom is all this stated. Instead, these considerations are implicitly invoked in references to *systemic* qualities of the units (see Zelditch).

There are, then, three reasons why some comparativists refer to units as systems. First, such references provide a crucial link between explicit strictures on methodology and vaguer, unarticulated assumptions about emergence, permanent causes and naturalistic doctrines of social scientific knowledge. Second, cross-societal research is thought to be re-

quisite for analyzing systemic properties. "Only cross-systemic research can elucidate systemic effects" (Frey, 181). At somewhat greater length, others explain that "every complex social unit . . . is an entity in its own right, is a context for its constituent elements" (Hopkins and Wallerstein, 184; see also Rokkan; Scheuch). Third, some sociologists and political scientists argue that comparability of units is determined by their systemic nature (Almond and Powell; Czudnowski; Parsons). This is because the term system denotes both boundary-maintenance and permanent causality. Indeed, virtually anything can be compared in this research strategy if observational units can be described as systems. Equating units with systems not only addresses the issue of comparability, but also invokes a specific comparative strategy.

2. The assumption that units are discrete systems leads directly to an interest in permanent causes. Recall Durkheim's argument that social causes emanate from the internal milieu of society. This implies that causes are attributes of units. Smelser notes that "the unit of analysis should be *causally* relevant to the phenomena being studied" (b, 173). Hopkins and Wallerstein's comment, cited above, also argues that social causes emanate from the constitution of the unit. In more recent work, Wallerstein continues to advance this position with respect to the world system, a unit whose properties determine the development of its components, nation-states.

Consistent with this position, statistical strategies of comparison proceed from selection of units to delineation of variables (see Przeworski and Teune). These variables are treated as attributes, some of which are causally prior to others. Relationships between these variables are thought to reflect systemic relationships—permanent causes—that hold across all members of the population of units.

3. Study of permanent causes entails concomitant variation as an appropriate logic of analysis with its bias toward "many comparisons—the more the better—in order to establish control for extraneous variation" (Schoenburg, 1). "Extraneous" in reference to this comparative strategy refers to contextual factors such as cultural diffusion and other contingencies associated with historical processes. These factors stand in the way of ascertaining permanent causes, and they must be controlled, averaged out in the error vector or ignored.⁹ Explanations referring to contextual factors are "not a plausible alternative to functional correlation" (Zelditch, 283; see also Etzioni and DuBow; Gurr and Ruttenberg; Marsh) because they refer to "accidental" and not "essential" features of social units (Elder, 216; see also Andreski; Gillespie; Grimshaw).

The logic of analysis used in comparative study of permanent causes minimizes the role of non-systemic causes associated with historical contexts and contingencies. This is evident in methodological commentaries.

Smelser asserts that contextual factors represent parametric differences and thus "constitute sources of error" (b, 176). For Frey and for Verba (b), the advantage of cross-national data is that they not only provide a wide range of values for general variables, but also a wider range of variation in extraneous factors such as national histories. Form also states that in comparative studies of industrial organization an ideal research design would attribute unexplained variance to "sociocultural factors, measurement error and ignorance" (61; see also Jacob and Jacob; and see Cutright who argues against attributing unexplained variance to cultural factors). Additional examples of this reasoning are remarks by Inkeles on individual modernity scores and by Treiman on occupational prestige, which attribute unexplained variance to nationality and specific cultural patterns.

Statistical strategies of comparison frequently refer to non-systemic effects as being cultural in nature. They presume that cultural factors are diffusible and idiosyncratic in ways that structural factors are not (see Czudnowski). However, diffusional and idiosyncratic effects can have structural sources, and systemic variables that are associated with permanent causes can as well be cultural in nature (see Ellis et al.; Swanson; Underhill; Vanneman).

4. Use of statistical methods in comparative studies of permanent causes implicates forms of explanation that refer to patterns of relations among abstract variables. Adequate explanation thus consists of transhistorical propositions based on these patterns observed in the widest possible population of units (Holt and Turner; Levy; Lipset; Przeworski and Teune; Schweitzer; Smelser, b). The merit of this comparative strategy is its potential for generalization. These advantages occur, however, at the expense of complexity. As several have noted (e.g., Burrawoy; Form; Lafferty; Lammers; Sharlin; Tomasson), explanations referring to relations among highly abstract variables encourage neglect of the historically situated character of societies.

We suggest that the systemic presuppositions of a statistical strategy of comparison require this neglect. It is necessary to examine a large number of cases to ensure that permanent causes are distinguished from historical contingencies. Comparability also requires conceptualization of unit attributes at high levels of abstraction in order to obtain "functional equivalence of items" across societies (Verba, a, 314; see also Almond and Verba; Elder). At best, the historical character of populations in statistical strategies of comparison is taken into account in specifications about the scope conditions of variable relations (see Nowak).

More generally, "all purpose categories" (Zelditch, 275) characterize variables that represent unit attributes in this comparative strategy. Where contextual factors seem important, researchers are encouraged to transform them into variables by reconceptualizing them at higher levels of generality (Almond and Verba; Grimshaw; Hopkins and Wallerstein; Smel-

ser, a, b; Przeworski and Teune). Consideration of non-systemic explanations stressing historically contingent factors is thus permanently postponed because it is thought to constitute an undesirable solution to an analytical problem concerning levels of generalization.¹⁰

Variable-Based and Case-Based Comparative Strategies

Taken together, these features of Durkheim's comparative strategy direct attention away from observational units of analysis to testing propositions about general patterns of relationships among abstract variables. There is a sharp polarization between the *subject* of research, relationships among variables, and *objects* of research, the observational units (Ragin, a).¹¹ It is this disjunction that accounts for the observation that comparativists in sociology are often unfamiliar with the populations constituting their data bases.

However, this disjunction between subjects and objects of research is not a problem in view of the theoretical interests of Durkheim's comparative strategy. A variable-based strategy seeks transhistorical generalizations, not concrete knowledge about specific cases. This does not, however, make it a preferred strategy apart from its theoretical interest in permanent causes. Such a preference overlooks reservations about highly abstract generalizations by sociologists who prefer historically-grounded generalizations (see Bendix, a; Bendix and Roth; Zaret, a, b). A result of this oversight is the false dichotomy between variable-based comparisons and case studies (see Ragin, c).¹²

Advantages of the former are revealed by contrasting them with putative deficiencies of the latter. Grimshaw remarks that the "comparativist is not concerned with the mechanics of bureaucracy in the particular case but rather with the interaction of variables such as autonomy, accountability, authority, and responsibility over a large number of cases" (19-20; see also Smelser, b; Teune). Yet implied deficiencies of case-based research, that it is neither comparative nor conducive to empirical generalization, are certainly not to be found in Weber's work, which we argue is a case-based strategy of research. Weber's case-based strategy of comparison produces explanation and generalization, but unlike Durkheim's variable-based strategy, explanation is genetic, not functional, and generalizations are historically concrete, not abstractly ahistorical.

Historical Comparison and Ideal Types

Weber's comparative strategy is well-suited to issues that cannot be addressed adequately by statistical comparative strategies: questions about

historical diversity. Weber's preference for genetic rather than functional explanation stems from his interest in the causes and consequences of this diversity (e, 15). His methods concern concrete cases. This is what distinguishes them most clearly from Durkheim's comparative strategy.

With the latter, researchers test for patterns of relations among abstract variables. This relegates Weber's concerns for diversity to a *posteriori* speculation about deviations from normal species patterns. While Durkheim's comparative strategy seeks generalizations by separating data and history, Weber's strategy turns to history for modest generalizations about historical diversity. Turning to history implies a case-based rather than a variable-based strategy, but, let us repeat, it does not imply renunciation of explanation and generalization. Rather, it leads to a different type of explanation and different degrees of generalization.

An interest in concrete cases is evident in virtually every aspect of Weberian comparisons. While practitioners of Durkheim's strategy begin research by defining a subject of research (i.e., relevant variables and their relationships) and then turn to a sample of observational units, a Weberian starts with an interest in specific historical processes and structures. Central to this strategy is use of ideal types to identify causes of diversity among historical processes and structures.

Ideal types are used to accomplish several related tasks: they aid conceptualization of research subjects; they help in the identification and assessment of adequate causes, and they provide a basis for explanations of historical diversity. In Weberian research, virtually every concept is conceived ideal typically, whether the concept is used in a taxonomic or more strictly explanatory manner.

Using ideal types to conceptualize research subjects presents an alternative to Durkheim's realist treatment of units of analysis, which regards them as natural systems. Weber regards units as hypothetical constructs and accordingly conceives them as ideal types. In this nominalist view (b, 439), the ultimate unit is meaningful action. That only the individual can be a carrier of meaningful action does not mean that individuals are the only possible research subject (see Roth, b, 120). Rather, it indicates that collective concepts—such as those in *Economy and Society*—must be carefully defined with ultimate reference to socially mediated meanings. Weber's nominalism, then, requires that research subjects be defined with utmost care and precision. Ideal types are especially well-suited to this task because they present an exaggerated version of reality and accentuate theoretically relevant features of it.

Throughout his work, Weber associates ideal types not only with terminological clarification but also with the formation of hypotheses (c, 189; d, 107, 123; e, 21; but see Bruun). Ideal types are models that are selectively developed as aids to genetic explanation. Structural properties of ideal types are often closely related to specific genetic issues. Capitalism as

a model and rationalization are inseparable, as are ethical religion and rationalization, and charisma as a model and its routinization as a historical process. Because of this Weber calls ideal types "genetic concepts" (a, 93, 106). Their one-sided accentuation of significant features of research subjects clarifies hypotheses about the causes of historical diversity.

The genetic character of ideal types is thus inseparable from their one-sidedness. For example, Weber notes that one can formulate the concepts of Church and sect genetically or statistically. However, in formulating "the concept of 'sect' genetically, e.g., with reference to certain important cultural significances which the 'sectarian spirit' has had for modern culture, certain characteristics of both [Church and sect] become *essential* because they stand in an adequate causal relationship to those influences" (a, 93).

Ideal Types and Genetic Explanation

According to Nagel, genetic explanations show "why it is that a given subject of study has certain characteristics, by describing how the subject has evolved out of some earlier one." Such explanations contain "singular statements about past events"; "those events which are mentioned are selected on the basis of [theoretical] assumptions . . . as to what sorts of events are causally relevant" (25). Weber's use of ideal types is consonant with Nagel's remarks on genetic explanation. But Weber specifies in greater detail than Nagel how "assumptions" about "causal relevance" guide comparative analysis of historical causes.

Assumptions about causal relevance must satisfy criteria of logical consistency and objective possibility (Weber, a, 92). The latter can be informed by abstract generalizations of the sort generated by Durkheim's comparative strategy. Use of abstract generalizations in ideal types provides hypotheses about enabling conditions and limiting means as they affect relevant subjective motives. These motives are revealed by interpretive procedures. Ideal types thus combine two types of knowledge, abstract generalization and interpretation of motives (Zaret, b). Abstract generalizations (nomothetic knowledge) are not foreign to Weber's work, but they play only an *ancillary* role, as a preliminary to genetic explanations of historical structures.

For example, an ideal type of rational capitalism, as a model, can use abstract generalizations about marginal utility and general features of exchange relations (Weber, a, 100; b, 396). But as Weber notes, such generalizations raise issues that are distinct from the historical problem of the existence of a money economy "on a mass scale as a fundamental component of modern capitalism." Genetic explanation provides the solution to this historical problem. For this solution, "analysis of the *general* aspects

of exchange and the technique of the market is a . . . *preliminary task*" (a, 77; emphasis in original). Relationships among abstract variables revealed by correlational analysis can aid the *preliminary* task of delineating attributes of models that, as ideal types, are used in comparative analysis of historical causes.

Transhistorical generalizations, a goal of Durkheim's comparative strategy, are for Weber a means to another goal, genetic explanation of historical diversity. In several places (c, 63–6; and see a, 75–6, 80; e, 15), Weber observes that statistical uniformities revealed by the permanent cause logic that we have identified as quintessentially Durkheimian "may have extraordinary *heuristic* value." But "the correlations would only be one among many possible techniques for forming *concrete* concepts"—that is, for forming ideal types as tools of comparative historical analysis. Weber's conclusion is unequivocal: "it obviously does not make sense to suppose that the ultimate *purpose* of concept formation in the historical sciences could be the deductive arrangement of concepts and laws—discovered by employing correlations—under other concepts and laws of increasing general validity and abstract content" (emphasis in original).¹³

Genetic Explanation and Comparative Analysis

With ideal types, researchers formulate and, more importantly, evaluate genetic explanations of historical diversity. This focuses attention on a historically delimited set of research subjects; it principally concerns concrete cases, not abstract variables, as in the Durkheimian strategy. Moreover, different conceptions of causation apply to Durkheim's and Weber's comparative strategy. With the former, explanations about permanent causes conceive them as systemic attributes of sampled units that characterize all units of the population. In genetic arguments, interest in the historical origins of diversity among concrete cases leads to hypotheses about combinations of temporally discrete causes. Relevant causes are not viewed as permanent causes. For example, an interest in the diversity of political outcomes associated with modernization can stress the nature and timing of social revolution as an important historical cause.

This distinction has important implications for comparative methods. In permanent cause arguments, causes and effects are linked in a continuous manner. Variation in one produces variation in the other. Genetic arguments, in contrast, are characteristically combinatorial; specific conditions combine to produce a specific historical outcome. In genetic arguments, simultaneous satisfaction of a set of preconditions is necessary for subsequent historical outcomes.

Methods for evaluating genetic arguments differ from those used to test permanent cause arguments. As we noted above, the latter entail use

of correlational techniques as an appropriate tool of analysis. Genetic arguments involve qualitative historical techniques based on what Gee calls "logical methods." These include three of the techniques defined by Mill as methods of inductive inquiry: the method of agreement, the method of difference, and the indirect method of difference (see Skocpol and Sommers; Smelser, b; Zelditch).

These methods are logical and not statistical in nature because they are used to identify *invariant* relationships, not statistical or probabilistic relationships. In other words, an investigator would use these methods to identify patterns of constant association, not to explain variation. For example, the method of agreement argues that *X* causes *Y* if and only if all instances of *Y* have only the causally relevant condition *X* in common. (Note that *X* could be either a single cause or a recurrent combination of causal conditions.) This method requires that the investigator identify relevant instances of *Y* and then show that all instances of *Y* have *X* and no other theoretically relevant cause or combination of causes in common. To use this method in an analysis of the causes of revolutions, the investigator would historically examine a set of revolutions and attempt to determine causal conditions common to the entire set.

Of course, it is often difficult to identify invariant relationships that are neither circular nor trivial. Statistical inquiry into probabilistic relationships is one way to avoid this problem. Another way is use of Weberian comparisons. Recall that a key feature of the Weberian strategy is the goal of explaining diversity. From the Weberian perspective, the fact that invariant relationships are rare (or at least seem to be) presents opportunities, not problems. For example, if it proved impossible to identify causal conditions common to a set of revolutions, an investigator using Weberian methods would directly confront the issue of diversity. The investigator would identify types of revolutions within the original set and establish common causal conditions within each type. Invariant relationships between different causes and types of revolutions would be established by applying the method of agreement to each type and the indirect method of difference between types.

This interest in invariant relationships between different combinations of historical causes and outcomes is what most sharply distinguishes qualitative historical from statistical methods of comparison. Confronted with a diversity of historical outcomes, a practitioner of the Durkheimian strategy would first reconceptualize diversity as variation (preferably of a quantitative nature) and then attempt to identify variables that account for this variation. The Weberian strategy uses qualitative historical methods to identify different patterns of invariance within the diversity, each pattern of invariance constituting a historical path. These qualitative techniques are well-suited to the task of pinpointing patterns of invariant relationships

(i.e., the different combination of historical causes responsible for different historical outcomes) because of their use of logical methods.¹⁴

This difference between qualitative historical and statistical methods is often overlooked in discussions of comparative sociology and the comparative method. In fact, there is considerable confusion in the social sciences today concerning this difference. Typically, qualitative historical methods are treated as a crude approximation of statistical methods. Smelser (b; see also Skocpol, 36) argues that the method of "systemic comparative illustration" (his term for qualitative historical methods) must be used when the number of relevant cases is too small to permit use of multivariate statistical techniques: "This method is often required in the comparative analysis of national units or cultures—where the sample is often small." The implication that qualitative historical methods mimic statistical methods exists in work by other comparativists. For example, Skocpol and Sommers argue that Barrington Moore's seminal work has a methodology (based on Mill's logical methods) that "resembles that of the statistical method" (182).

While we agree with these scholars' identification of Mill as the progenitor of methods used by many comparativists, we disagree with their suggestion that these methods mimic the statistical method. This implies that those who use qualitative historical methods of comparison would prefer to use statistical methods if they had better data. We think not. The theoretical goals and practical strengths of qualitative historical methods differ fundamentally from those of statistical strategies of comparison.

Contemporary Weberian Strategies

Major features of Weber's comparative strategy appear in several recent and important studies (e.g., Anderson, a, b; Bendix, c; Moore; Skocpol). Their explicit or implicit use of qualitative historical methods to establish genetic explanations of historical diversity sets them apart from studies of change and modernization that use a Durkheimian strategy of comparison. In addition, they focus precisely on what is ignored or minimized by Durkheimian strategies: contextual effects of historical origin.

A contemporary exemplar of the Weberian research strategy is Moore. He uses three ideal types to explain the paths traveled by seven nations to different political outcomes in the nineteenth and twentieth centuries. Contextual effects are much in evidence: each path is also a historical phase that influences subsequent paths. The liberal democratic path taken by Britain, France and the U.S. influenced that taken by Germany and Japan, revolution from above, and that taken by the Soviet

Union and China, peasant revolts leading to communist regimes. Pre-revolutionary factors concerning agrarian organization and its commercialization, urban autonomy and class alliances combine in a different configuration in each historical path. Moore's analysis traces similarities and differences between paths, but he also examines divergence within each route, especially the democratic. Genetic explanations of historical diversity are no less evident in work by Bendix (c) and Skocpol. Somewhat less obvious is use of a Weberian strategy of comparison by some Marxist scholars.

Consider Perry Anderson's massive two volume work (a, b). Written as a contribution to Marxist scholarship, it rejects implicit evolutionary themes that typify many accounts of an inexorable transition from feudalism to capitalism. Broadly put, Anderson's task is to explain the "historical specificity of European society" (a, 7; b, 397, 420). He describes the rather remote configuration of conditions that "rendered the unique passage to capitalism possible in Europe" and concludes that these conditions lay in "the concatenation of antiquity and feudalism" (b, 420). His analysis principally compares Eastern and Western European development, and to a lesser extent occidental and non-occidental development.

This combinatorial analysis describes different causal factors that led to the rise of feudalism, then absolutism, in Eastern and Western Europe. Divergent historical trajectories divide Europe east and west of the Elbe, a divergence genetically explained with reference to different configurations of causes. A synthesis of Romanic-Imperial and Germanic-tribal social formations in the west, and its absence in Eastern Europe, accounts for the historical gap between the two (b, 417). In the west, this synthesis led to a parcellized sovereignty conducive to autonomous urban centers and an independent bourgeoisie (a, 150; b, 410, 422). Lack of this synthesis in frontiers east of the Elbe led instead to a different feudalism, with weaker impulses toward urban autonomy (b, 213-6, 229). Differences among absolutist states and their bearing on class struggles in Eastern and Western Europe depend on the presence or absence of historical factors that promoted the growth of autonomous urban sectors (b, 40, 216-8, 430).

Anderson does not discuss methodological issues, apart from historiographic ones. But his commitment to substantive Marxist views does not lessen the thoroughly Weberian format of his work. This is evident at the end of his study where he concludes that the significance of feudalism "born of conflict and synthesis between two anterior modes of production, was thus the extreme differentiation and internal ramification of its cultural and political universe. In any comparative perspective this was not the least important of the peculiarities of the continent" (b, 412). Anderson's study provides an exemplary instance of Weberian comparison, stressing as it does a combinatorial analysis of the origins of historical divergence.

Combining Durkheimian and Weberian Strategies

Previous discussions (e.g., Smelser, b) of Durkheim's and Weber's strategies of comparison emphasize their convergence, not in their theoretical assumptions but in their actual research. Areas of practical convergence may exist, but this consists of combining the two strategies, not conflating them. The strategies that we outline as Durkheimian and Weberian use different logics of analysis to produce different forms of explanation in achieving their respective theoretical goals—for the Durkheimian, the goal of broad generalizations about systemic relations; for the Weberian, the goal of historically contextualized knowledge of the origins and consequences of historical diversity. These goals are irreducible.

However, it is neither necessary nor desirable to segregate comparative research along Durkheimian and Weberian lines. Differences between the two strategies are as complementary as they are irreducible. Not only does each strategy solve problems left unresolved by the other; each can positively aid the other, as can be seen in our following suggestions. These suggestions bring the unique features of historical and statistical certainty to bear respectively on Durkheimian and Weberian strategies of comparison. As an auxiliary to qualitative historical comparisons, the Durkheimian strategy seems strongest as a preliminary to analysis, as an aid in forming ideal types. As an auxiliary to statistical comparisons, the Weberian strategy can be a useful preliminary, aiding rigorous definition and construction of populations, and a necessary conclusion, explicating causal mechanisms responsible for observed correlations.

There are several ways in which statistical comparisons can contribute to the Weberian strategy. A well-known criticism of ideal types is that they are imaginary constructs. Based on thought experiments and only indirectly connected to empirical events, they can impede rather than facilitate comparative research. Statistical comparisons can prevent too wide a gulf from developing between ideal types and empirical events.

For statistical comparisons to do this, it is necessary to distinguish between historical models and secular theories in ideal types (see Roth, b). Structural features of many ideal types can be isolated from genetic issues, and these features can be reconceptualized as variables and subjected to correlational analysis. Obviously, ideal types can neither be formulated nor verified in this manner. They are nominal concepts whose validity rests on their utility in historical comparisons. But this procedure does allow investigators to check the empirical plausibility of the ideal type's accentuation of reality.

A second use of correlational methods in Weberian research concerns the construction of ideal types. Above we noted that correlational methods are suited to this task. Statistical uniformities revealed by these methods can be incorporated in ideal types as rules of experience (Weber,

a) that meet the criteria of objective possibility. Careful use of transhistorical propositions in formulating ideal types increases their heuristic value as middle-range concepts for comparative research.

It is also possible to strengthen statistical strategies of comparison with qualitative historical comparisons. One way concerns the definition and selection of units of observation. Durkheim's use of species is clearly unsatisfactory. This has left a vacuum which is filled with implicit historical judgments (e.g., using a sample of all known societies or some vaguely defined subset). Qualitative historical comparisons provide a better remedy. Theoretical arguments about the research subject can be used to construct an ideal type of the observational unit. Comparisons of observations with this ideal type could be used to establish membership criteria, and the relevant population of units can then be specified. Cross-societal correlations consequently would emerge from rigorously constructed populations of comparable units.

Qualitative historical comparisons can also resolve well-known problems of the relationship between correlation and causation. Causal mechanisms are not visible in correlations; they are specified in theories. Researchers who assert that a correlation illustrates a particular causal process can be contradicted by others who argue that different causal mechanisms are at work. Weberian comparisons can help solve this problem because genetic arguments produced by qualitative historical research pinpoint precise causal sequences. A good example of this is Paige's study of agrarian revolution which uses qualitative analysis to explicate causal sequences implied in correlational analyses of world patterns.

Conclusions

Methodological procedures, no matter how narrowly construed, follow priorities laid down by theoretical interests and commitments. These commitments are substantive and epistemological in nature. In the comparative strategies of Durkheim and Weber, there is an explicit relation of logical adequacy among methodological stricture, substantive interest, and epistemological commitment. Both advocate and use comparative methods that are consistent with their substantive conceptions of order and change, and with epistemological conceptions of social scientific knowledge. Durkheim grounds his comparative strategy in a substantive view of society as a system and in a positivist vision of a natural science of society. Weber's comparative methodology emerges from his preoccupation with the origins of historical diversity and a neo-Kantian philosophy of science.

Durkheim's theoretical commitments led him to notions about emergence, a realist conception of units as systems, analysis of systemic causes using correlational methods, and functional forms of explanation. Weber's

theoretical commitments led instead to a heuristic conception of units that rules out notions of emergence, to analysis of historical causes using qualitative historical methods, and to genetic forms of explanation. The choice, as Weber saw it (a, 102–3, 106), was either to develop limited theoretical constructs that could be used to interpret historical phenomena or to create ambitious, comprehensive theories that use history for illustrative purposes. For Durkheim, historical diversity was a hindrance. His strictures (d, 117–8) against genetic explanation have no counterpart in Weber's thought precisely because of Weber's interest in understanding the causes and consequences of historical diversity.

Of course, for many contemporary sociologists, goals of Weberian comparison seem less desirable than those of Durkheim's comparative strategy. In part, this is because Durkheim, unlike Weber, promises to provide cumulative knowledge in a discipline prone to excessive concern about its status as normal science. The historically grounded character of Weberian explanations makes them far more limited in application than the transhistorical generalizations of Durkheimian sociology.

It is for this reason that arguments about a methodological convergence of Durkheim and Weber, of statistical and qualitative-historical strategies of comparison, may seem attractive. But such arguments obscure the problem of choosing and combining appropriate research strategies, and they blur methodological and theoretical features of different strategies. The problem of choosing appropriate strategies can be avoided by caricaturing these differences, equating them with a choice between science and non-science, sociology and history, explanation and description. Yet none of these distinctions applies to the variable-based and case-based strategies developed respectively by Durkheim and Weber.

Is there a middle ground between their positions that might contain a resolution of their methodological differences? We think not. The two strategies are neither congruent nor convergent with regard to units of analysis, conceptions of causality and adequate explanation, or logic of analysis. But different aspects of the two comparative strategies can be combined in complementary ways to improve the quality of comparative work. This, however, presupposes due appreciation of the unique strengths of each strategy.

Notes

1. Complexity and generality refer to different priorities in concept formation. Strictly speaking, they are not logically antithetical as are complexity/simplicity and generality/particularity. Still, emphasis on complexity occurs at the expense of generality, as McKinney notes.
2. Our study is limited to comparative research that is cross-societal. This is solely for the purpose of keeping the study within manageable bounds.
3. Smelser argues that, "Durkheim's recognition of the necessity to construct a typology of social species and Weber's strategy of generating ideal types moved the two scholars closer to one another than they were in their original paradigmatic statements" (b, 56; and see b, 39).

Our analysis reveals more internal consistency in Durkheim and Weber's work than Smelser acknowledges. This is probably the result of his commitment to a comparative strategy that we identify below as Durkheimian. Driving a wedge between theory ("paradigmatic statements") and research ("practical programs") in Durkheim and Weber allows Smelser to focus on those aspects of their work that are compatible with statistical strategies of comparison.

4. Smelser says that Durkheim disregards his programmatic strictures when he classifies societies into species. Presumably this violates positivist notions about the "passivity of the investigator" (b, 53). Yet it is clear that Durkheim regards species as empirically delineated categories and not as nominal concepts dependent on a theoretical context. Not surprisingly, Smelser concludes that Durkheim's typology of species moved him "significantly in the direction of Weber's formulation of the role of the investigator, and . . . in the direction of Weber's view of the nature and purposes of classification" (b, 56). We show below that analytical units and role of the investigator in formulating them are almost antithetical in the research and theory of Durkheim and Weber.

5. Functional explanation here refers to a logic of explanation (see Nagel), and not to substantive commitments of structural-functional theory. Our analysis contrasts Durkheim's use of functional explanations to Weber's use of genetic explanations.

6. Durkheim makes this point in several passages: "Les institutions sont, en effet, à ces incidents extérieurs ce que, chez l'individu, la nature et le mode de fonctionnement des organes sont aux démarches de toutes sortes qui remplissent notre vie quotidienne" (h, I:146; and see h, I:201, III:19).

7. In early writings Durkheim remarks of "living beings" that "l'idéal pour chacun est de vivre en harmonie avec ses conditions d'existence. Or cette correspondance se rencontre également à tous les degrés de la réalité" (h, III:25). The attenuation of substantive biological conceptions in the course of his work (see Hawkins) did not lead him to reject this position, which is a postulate of modern systems theory.

8. See Durkheim: "Mill pose, en effet, que ces éléments ne peuvent pas se combiner d'une manière quelconque, mais qu'il existe entre eux des *corrélations naturelles* en vertu desquelles ils ne peuvent s'associer que suivant un rapport déterminé" (h, I:131; our emphasis). The same point is made in *The Division of Labor* where different milieus and their causal efficacy are conceived in terms of different forms of solidarities.

9. In response to the problem of cultural diffusion, two sociologists (Blumberg and Winch) defend their correlational analysis of a sample of societies based on Murdock's *Ethnographic Atlas* with the remark: "As sociologists . . . we note that diffusion among contemporary industrial and industrializing nations has reached world-wide proportions, and yet cross-national analyses continue to be done" (903n).

10. This leads to a denial of history in the sense that the past can be seen as a cause of the present. Seldom is this stated explicitly in discussions on eliminating contextual effects by higher levels of generalization. An exception is Czudnowski: "the so-called 'impact of the past' is to a large extent a cultural reinforcement of attitudes determined by persisting social, economic, or ecological restraints" (24-5). For trenchant criticisms of this position see Gellner.

11. This lies at the core of critical comments on comparative studies of mobility by Eisenstadt and also Sharlin. Sharlin complains that "mobility has been set off by itself as an object of study" and that "the study of mobility has ironically been isolated from the study of society" (339-40).

12. We agree with Stinchcombe's remark that "the dilemma between synthetic reasoned generalizations, tested against the facts, and historical uniqueness, a portrait of the facts, is a false dilemma" (115-6). However, Weber's comparative strategy is different from Stinchcombe's prescription for this dilemma: establishing deep analogies among facts in view of larger theoretical issues.

13. What did not make sense to Weber is today, in slightly altered form, a dominant style of theoretical reflection in sociology, axiomatic ordering of formalized propositions that have been counterfactually tested by correlational analysis of data.

14. To examine combinations of conditions with multivariate statistical techniques, it is necessary to test for statistical interactions (see for example, Chirot and Ragin; Ragin b). Smelser (b, 145n), citing a communication from Herbert Costner, makes this same point. However, Smelser does not mention serious technical problems associated with attempts to test for higher-order statistical interactions. Even if only six historical conditions are identified as relevant, an exhaustive statistical analysis of combinations of six conditions would require an equation with sixty-four terms. This would create an indecipherable mountain of multicollinearity and compound degrees of freedom problems. Note that because Weberian methods focus on historically delimited phenomena, the number of relevant cases characteristically is small.

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