Rebutting 'Perestroika': Method and Substance in Political Science

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Abstract

This article addresses the anti-methodological claims of the self-proclaimed 'Perestroika' reform movement in the American political science profession. It demonstrates through qualitative and quantitative examples how and why the Perestroikans are wrong. It argues that method in political science is intimately and necessarily linked to substance, and that the discipline's role in providing meaningful answers to real world political problems can only be enhanced by continued attention to the ways in which we formulate research questions, theorize about possible relationships and explanations for observed outcomes, provide sound research designs, gather and present evidence, and draw logical inferences from that evidence.

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Introduction

At the beginning of the 21st Century, modern political science, with its combination of theory and method as applied to real world problems is over one hundred years old (Seidelman 1985). Gabriel Almond (1996: 52) observes that the 'essential object of political science...is the creation of knowledge, defined as inferences or generalizations about politics drawn from evidence.' For King, Keohane, and Verba (1994: 7) '[s]cientific research is designed ... to make inferences based on empirical information about the world'. The editors of the British Journal of Political Science require scholars to submit research with the 'use of appropriate evidence to substantiate empirical statements'. Despite its origins in the normative and empirical work of the ancient Greeks, most notably Plato and Aristotle, modern political science in the form that meets these definitions showed a burst in development around the turn of the 20th Century. Lasswell (1968) times it with the Spanish American War in 1898, followed by bursts in the aftermath of the Russian Revolution, World War II, and the Cold War.

In many ways, the discipline has come full circle in its development. Described as 'eclectic progressive', the discipline's evolution in the 20th Century started with formal legal and institutional comparisons, moved to an almost exclusive focus on individuals (the 'behavioural revolution' and rational choice), rediscovered the importance of institutions (the advent of the 'new institutionalism'), while it continuously struggled with the question of culture (see Almond 1996; Eulau 1996; Mair 1996; Easton 1997; Lichbach 1997; Blyth and Varghese 1999). In the subfield of comparative politics, substantive evolution in the field was mirrored by its methodological developments. Earlier 'legalistic' and formal institutional comparisons were carried out on a small sample of countries usually isolated to the United States and Western Europe, or to areas such as Latin America (see Valenzuela 1988). The relegation of formal institutional comparisons for more general comparisons was accompanied by the increase in the number of countries in the sample, aided by the advent of computer technology and a commitment to providing comparable indicators of politics. A certain disillusionment with large-scale comparisons and the 'rediscovery' of institutions (particularly the state)[1] led to an increase in few-country studies, and in some corners of the discipline, a definitive call for a conscious return to few-country studies (Valenzuela 1988: 86), and single-case studies.[2]

Today, both the substantive foci and theoretical perspectives with which to examine them are more eclectic and open to change than ever before. What has not changed, however, is the importance of systematic method and the need for inferential rigour (Lasswell 1968: 6; Almond 1996: 89; Whitehead 1996: 355). Indeed, the political science literature is replete with new texts on method, including Designing Social Inquiry (King, Keohane, and Verba 1994), Theories and Methods in Political Science (Marsh and Stoker 1995; 2002), Doing Research in Political Science (Pennings, Keman, and Kleinnijenhuis 1999), Issues and Methods in Comparative Politics (Landman 2000; 2003), Essentials of Political Research (Monroe 2000), and Political Analysis (Hay 2002). While each text emphasises different dimensions of political

[1] The classic call for more analysis that focuses on the state can be found in Evans, Ruescehmeyer, Skocpol (1985). Other seminal pieces on 'new' institutionalism include March and Olsen (1984) and Steinmo, Thelen, and Longstreth (1992).

science research, they all stress the need for intellectual honesty, sound research design that is linked to substantive questions, and the importance of the evidence-inference methodological core of political science (Almond 1996: 52).[3] Even among alternative and postmodern approaches to politics, there is a concern over 'empirically justifiable explanations of the social and political world' and how to apply new conceptual frameworks drawn for post-structuralism and linguistic analysis to 'key political issues' (Howarth and Stavrakakis 2001: 1).[4]

In addition to the proliferation of new texts on method, political science graduate programmes are increasingly prescribing theory and methods courses as core components of their curricula. Easton (1997: 41) observes that '[f]ew departments of political science around the world would now fail to provide students with basic training in rigorous techniques for acquiring, assembling, and analyzing data and for relating theories of various levels to such data.' In the United Kingdom, official recognition by the Economic and Social Research Council (ESRC) of graduate training programmes in the social sciences is contingent upon curricula having core courses in methodology, including the philosophy of science, dominant idioms of analysis, and qualitative and quantitative research techniques. In Ireland, the political science department at Trinity College has adopted a US-style PhD programme, which includes mandatory courses in scope and methods. In addition, many continental

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[2] In the last survey carried out in the field of comparative politics, 62 per cent of all articles in Comparative Political Studies and Comparative Politics between 1968 and 1981 were case studies of single countries.
[3] This coupling of evidence and inference has also been referred to as the 'customary pair' of theory and observation (Feyerabend 1993: 23; see also Gordon 1991: 589-634).
[4] While standing starkly opposed to positivist, behaviouralist, and rationalist forms of explanation, Howarth and Stavrakakis (2001: 7) concede that [w]hile the truth and falsity of its accounts are partly relative to the system of concepts and logics of discourse theory used (as in any other empirical inquiry), the ultimate tribunal of experience is the degree to which its accounts provide plausible and

European universities, especially in Denmark, Germany, and the Netherlands, are adopting courses in method, while countless others are holding 'summer schools' in social science data collection and analysis.[5]

It is thus compelling in light of these two trends in the discipline - a proliferation of methods texts and methods courses - that a new protest movement is building in the United States that questions the importance of method for political science and criticises its main professional organisation, The American Political Science Association (APSA). Known as the 'Perestroika' movement, it criticises the discipline's overemphasis on method and mathematical sophistication, leading the profession to lose sight of political puzzles and problems and/or providing answers that are largely unintelligible to policymakers and practitioners (Bennett 2002; Smith 2002). It also criticizes the absence of democratic accountability in the organisation, and how publication in its main journal, The American Political Science Review (APSR) has become a key criterion for promotion in the American academy.

While demanding the implementation of mechanisms that will guarantee democratic accountability and calling for a broadening of the publishing venues for promotion decisions seem sensible and unassailable, this article takes objection to the anti-methodological sentiment expressed by the movement. In contrast to this sentiment,

convincing explanations of carefully problematised phenomena for the community of social scientists.' See also Howarth (2000: 126-142).

[5] The University of Essex regularly is host to the ECPR Summer School in Social Science Data Collection and Analysis (www.essex.ac.uk/ecpr/summerschools/essex_sumsch.htm), which has a variety of courses on quantitative and qualitative methods, including standard regression and survey courses, qualitative interviewing and focus groups, network analysis, survival analysis, case studies, as well as discourse analysis and psychoanalytic approaches. Elsewhere in Europe, there are methods summer schools held in Marburg (Germany), Florence (Italy), Oslo (Norway), Lille (France), Budapest (Hungary), Leiden (Netherlands), Tescani (Romania).

the article argues that attention to method and emphasis on the fair gathering and analysis of available evidence is paramount to a political science that aspires to providing well-grounded and meaningful answers to important political problems in the world, as well as solutions to political 'puzzles' that continue to attract the discipline's attention (Grofman 2001). To that end, it outlines the main methodological claims of the movement, provides a series of quantitative and qualitative examples from the extant literature in political science showing how and why the Perestroikans are wrong, and suggests how the discipline can maintain its relevance in the future.

Perestroika: A New Social Movement in Political Science?

Building from an anonymous letter sent by 'Mr. Perestroika' to APSA members, the protest movement has grown in number. 124 political scientists sent a joint letter to the New York Times in November 2000 (later joined by 98 more signatories) to demand reform of the organisation and to criticise the profession more generally (see Finifter 2000a: viii). It held discussions at the 97th Annual Meeting of the APSA in San Francisco and distributed red lapel pins to its supporters as a symbol to register its presence among the members of the APSA.[6] Despite is small relative size (222 out of 13,500 members),[7] the movement is not on the fringe and counts among its members a selection of political science luminaries (at least those who have featured in my own intellectual formation). These include Richard Falk (Human Rights Horizons),

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[6] There are two ironies with the name of the movement. First, one of the most spectacular failures of political science has been the inability to predict the collapse of the Soviet Union, even after the emergence of Gorbachev and his policies of glasnost and perestroika. Second, in contrast to the Gorbachev and his efforts to liberalize and authoritarian leftist regime, the Perestroikans in the APSA are trying to liberalize and/or reform what they perceive to be an authoritarian professional association permeated by a hegemonic and exclusionary set of practices.

[7] See www.apsanet.org/about/ for the basic facts about the organisation.

Margaret Keck (The Workers Party and Democratization), Jeffrey Kopstein (Comparative Politics), Scott Mainwaring (Catholic Church and Politics in Brazil, Building Democratic Institutions, Presidentialism and Democracy in Latin America), Joel Migdal (State in Society), Gerardo Munck (Authoritarianism and Democratization), James Scott (Moral Economy of the Peasant, Weapons of the Weak), Ian Shapiro (Pathologies of Rational Choice), Theda Skocpol (States and Social Revolutions), and Charles Tilly (Big Structures, Large Processes, Huge Comparisons, The Rebellious Century, From Mobilization to Revolution).[8]

The criticisms and demands of the movement can be found in various issues of the hardcopy and on-line versions of PS: Political Science and Politics (www.apsanet.org). The main charge of the reform movement that this article seeks to address is that the discipline has become highly 'technicist' and 'statistical' where method is given greater weight than substance (Bennett 2002; Smith 2002). In its 'Open Letter to the APSA Leadership and Members' the movement queries why the 'APSR and other prominent professional fora seem so intensely focused on technical methods, at the expense of great political questions [?]' (Allen et al. 2000: 735; emphasis mine). Such a focus on technical methods threatens 'alienating a larger and larger number of those who should be its [i.e. the APSA] members, and contributing less and less to the kinds of understanding of politics that is our responsibility to

[8] I studied political science as an undergraduate at the University of Pennsylvania, Latin American Studies at Georgetown University, political science at the University of Colorado, and comparative politics at the University of Essex. I moved from a general level of training to area studies and back to general training in the theory and methods of political science. Whilst gaining a multi-disciplinary and holistic exposure to Latin America, I felt a certain theoretical and methodological gap needed to be filled after studying at Georgetown. This list of political scientists includes many whom have worked on the politics of particular geographical areas such as Eastern Europe, Asia, and Latin America, or have engaged in macro-historical analysis to account for large political and social transformations. Paradoxically, many of them have been concerned about method and have produced work based on

advance' (Ibid.: 736). Kasza (2000: 738) argues that the 'preoccupation with method and research design has taken precedence over contributions to knowledge about politics.' Moreover, they argue that the absence of political scientists commenting on the 2000 Presidential Elections in the United States is clear evidence of discipline's lack of relevance (Libby 2001: 204).

The solution proposed by the movement is to give more weight to substance over method, effectively loosening the rules of inquiry and the logic of inference, while providing 'distinctive insights into substantive political questions' (Smith 2002: 10). While not abandoning methodological concerns altogether, the movement argues that political science research 'may not be methodologically innovative, unusually precise, or indeed mathematical, but [it must] nonetheless [provide] fresh empirical evidence and well-reasoned arguments sufficient to judge some positions on important issues to be more credible than others' (Smith 2002: B10). Smith's (2002) sentiment is probably shared by many who are frustrated with another edition of a political science journal packed full of regression co-efficients, t-values, R^2 values, maximum likelihood statistics, and algebraic derivations of strategic behaviour of imaginary congressional committee members.[9] While he continues by insisting on the kind of intellectual honesty and methodological pluralism for which this article advocates, a careless

quantitative analysis. Their studies feature heavily in my own work (Landman 1999; 2000; 2001; 2002; 2003) and form the basis of my course syllabi.

[9] For the period 1985-2000, an average of 2-3% of the articles in the APSR were exclusively on method, while a further 55% used quantitative methods in arriving at their conclusions for the period 1996-2000 (Finifter 2000b: 923-925). This figure is partially misleading since 48% of the 2042 total submitted articles from 1996 to 2000 were quantitative. The remaining 45% of articles comprised the categories of formal and quantitative (5%), formal models (15%), and interpretive and conceptual (25%) (Finifter 2000b: 925). Finifter (2000b) and Jervis (2000) argue that the topical composition of the APSR merely reflects the distribution of manuscript submissions.

reading of the movement's arguments could steer political science in a dangerous and unhelpful direction.

In light of these criticisms, it appears that there are three positions available to the discipline. The first, which the Perestroikans charge is no longer tenable, is that method takes precedence over substance. The second, which many within the Perestroikan movement advocate, is that substance ought to take precedence over method. The third position, which this article advocates, <u>is that method is the substance</u> (see also King, Keohane, and Verba 1994: 9). Without careful specification of the research problem, the identification of observable implications of the theory, careful collection and presentation of the evidence, and logical drawing of inferences, political science research will never be more than speculation and conjecture. Indeed, in following Smith (2002), the evidence and arguments advanced in this article demonstrate that 'fresh empirical evidence' and 'well-reasoned arguments' can only come from rigorous attention to research design and questions of method.

While it is empirically true that a large number of political science publications debate the finer points of methodology, causal inference, and quantitative techniques, without such debates, the quality of our inferences and the usefulness of our research is necessarily limited. The point of this article is not re-hash the age-old debate about quantitative-qualitative divide in political science (Ragin 1987; King, Keohane, and Verba 1994; Foweraker and Landman 1997: 48-49; Landman 2000: 18-19), but to show how and why attention to method helps political science provide answers to real world political problems. This basic point is illustrated with examples from the extant literature in comparative politics that highlight persistent problems of method - case selection, indeterminate research design, and the difference between quantitative and qualitative analysis - while at the same time showing that the discipline has contributed to the accumulation of knowledge about the political world. The discussion seeks to demonstrate the direct link between method, substance, and influence on policy. The examples are drawn from comparative studies on economic development and democracy, social and political revolutions, democratization, and neo-liberalism.

How and Why the Perestroikans are Wrong

Economic Development and Democracy

One dominant issue in comparative politics is the relationship between economic development and democracy. Two research strategies to examine this relationship emerged roughly at the same time in the late 1950s and early 1960s and have continued since. Quantitative studies gather indicators on economic development and democracy across large samples of countries and use statistical analysis to test whether there are significant relationships between wealth and democracy. The development in this research area has focussed on the size of the sample (its coverage across space and over time), the definitions and measures of democracy (procedural vs. substantive, continuous vs. dichotomous), and the functional form of the relationship (linear, curvilinear, 'step' function) (see Landman 1999: 608-610; 2000: 62-66; Przeworski et al. 2000: 14-36). In contrast, qualitative studies tend to compare the histories of a smaller sample of countries in order to examine the role of large socio-economic transformations on forms of political rule, such as the contradictions of capitalist development, changing class structures and alliances, the power and autonomy of the state, and transnational constellations of power (de Schweinitz 1964; Moore 1966; Rueschemeyer, Stephens and Stephens 1992). What are their findings, why has method been important, and how have the substantive conclusions influenced policy?

The global quantitative studies from Lipset (1959) to Burkhart and Lewis-Beck (1994) test the relationship using the best available data and quantitative techniques. Early studies make synchronic 'snap shot' analyses of the relationship (Lipset 1959; Cutright 1963; Cutright and Wiley 1969; Dahl 1971; Jackman 1973; Bollen 1979), the positive results of which have fed directly or indirectly into US foreign policies, such as Kennedy's Alliance for Progress, Reagan's Caribbean Basin Initiative, and Clinton's Summit of the Americas (Landman 1999: 626; see also Wiarda 1991; Chilcote 1994; Cammack 1997). The Alliance for Progress invested public funds into Latin America in an effort to promote economic development and democracy, while preventing social revolutions of the kind that occurred in Cuba. The Reagan and Clinton initiatives sought closer economic ties within the Americas, while ostensibly strengthening support for democracy. Such links between development and democracy have found expression in the Inter-American Democratic Charter, ratified in Lima on September 11 2001 by Organization of American States (OAS).

Subsequent studies tested the relationship across space and over time (Helliwell 1994; Burkhart and Lewis-Beck 1994), the results of which show a robust relationship between development and democracy, but one that is less so for developing countries. The time between the early studies and these latter studies also involved general discussions about the problems inherent in cross-section time-series statistical comparisons (Stimson 1985; Sanders and Ward 1994; Beck and Katz 1995), such as insecure inferences owing to time-serial problems and skewed distributions of data across countries. Such methodological discussions, to which the Perestroikans object, however, were crucial for latter investigations that sought to utilise larger and more complex data sets to examine the original research problem. After all, both democracy and development are the outcomes of long term historical and economic processes, and modelling such processes requires careful collection and analysis of cross-section time-series data.

The continued positive and significant relationship between economic development has not only help vindicate foreign policy and international assistance programmes over the years, but has also contributed to a rising expectation about the perceived benefits of democratic transition as well as triumphalist views about the future direction of history (see Fukuyama 1992; Singer 1997; Gray 1998).[10] But doubts about the relationship have remained, and new methods using different measures of democracy and different selections of countries, show the limitations of the inferences from the earlier studies. Przeworski et. al (2000) and Landman (1999) show that democracy is not the inevitable outcome of economic development in the world, and in Latin America, respectively. Przeworski et al. (2000) demonstrate that the positive finding at the global level is due to the fact that rich democracies tend not to collapse, while development itself has no bearing on the likelihood that a country will become

[10] The association between economic development and democracy can create rising expectations within citizens of developing countries based on a perceived equivalence between economic freedom and political freedom. Once democracy is established, expectations rise for the goods of economic development to be distributed more fairly. The simple causal link between economic development and democracy, which ignores complex intervening political factors, can ultimately threaten the process of democratic consolidation if citizens expect too much of the new democracy. In addition, the lack of

democratic in the first place. Landman (1999) shows that there is not a significant relationship across 17 Latin American countries using seven different measures of democracy and three different measures of development from 1972 to 1995. The results of their analyses have influenced debates within the United Nations Development Programme, published in the Human Development Report 2002 (UNDP 2002: 56), and have formed part of the curricula used in the training programmes run by the Council on Foreign Relations.[11] Without an ongoing debate and refinement of comparative quantitative methods, such an evolution in the inferences about the relationship between development and democracy would not have been possible.

On the qualitative side, de Schweintiz (1964) and Barrington Moore (1966) compared the developmental histories of a small sample of countries to examine the relationship between capitalist development and regime type. After comparing the character of economic development, social classes, political culture, and 'unique features' of Britain (democracy), the US (democracy), Germany (unstable democracy), and Russia (no democracy), de Schweinitz (1964: 11) argues that the 'Euro-American route to democracy is closed'. Moore (1966) expands his comparison to eight countries. Britain, France, and the United States are instances of liberal democratic outcomes; Germany, Italy, and Japan are instances of fascist outcomes; and Russia and China are instances of communist outcomes. He examines the character of economic

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economic performance in the new democratic period may lead to nostalgia for earlier periods of economic prosperity under conditions of non-democratic rule (Landman 1999: 626).

[11] A logical extension of this research area concerns questions of measuring democracy, good governance, development, and human right; a topic seen to be critical for such inter-governmental organisations as the United Nations and the European Union. For example, a series of inter-governmental and non-governmental organisations held a conference on human rights and statistics in November 2000 in Montreaux, which has had a number of follow-up activities. The European Commission sponsored a conference in Brussels on human rights impact assessment in November 2001, while Eurostat has a new interest in measuring democracy, good governance, and human rights. In all

development, class development and coalitions, and the role of the state, and concludes that the emergence of liberal democracy was explained by a violent break with the past led by forces from the bourgeoisie. In contrast to these two earlier studies, Rueschemeyer, Stephens, and Stephens (1992) expanded the number of cases on methodological and theoretical grounds. They compare a larger number of countries in Europe and North America than either de Schweinitz (1964) or Moore (1966) and add countries from Latin America and the Caribbean. They found that a violent break from the past was not a necessary and sufficient condition for the emergence of liberal democracy and that it is the working class, not the middle class that is seen to be the main agent of democratization.

Thus, in both the quantitative and qualitative examples presented here, the methodological advances represented by the latter studies show that precisely the kind of insights into real political problems that Smith (2002) calls for can be the direct result of methodological considerations. For quantitative studies, the size of the sample across space and time and the subsequent solutions to analysing such large and complex data sets provided different answers to the same research question. Moreover, the substantive inferences drawn from the latter studies have already had an influence on the policy advice and implementation. For the qualitative studies, original inferences about revolutionary breaks from the past and the pre-eminent role of the middle class (also a claim made by Lipset 1959) were displaced by more secure inferences based on a larger sample of countries. The basic methodological lesson for such studies is that inferences become more secure if political scientists raise the

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these examples, the international community is keen t understand how to measure and monitor political, social, and economic developments in the world in order to formulae better policies.

number of observations and think more carefully about research design (King, Keohane, and Verba 1994; Landman 2000).

Social and Political Revolutions

Studies on social and political revolutions provide rich examples of how case selection can affect the types of answers to the same research problem (see Geddes 1990). In Peasant Wars of the Twentieth Century, Eric Wolf (1969) compares the history of revolutionary struggles in Mexico, Russia, China, Vietnam, Algeria, and Cuba in order to identify the common factors that explain the outbreak of peasant wars and their role in fomenting successful revolutions. His 'master variable' is capitalist transformation, which introduced the logic of market mechanisms into agricultural communities historically founded on altogether different systems of production and existence. The commercialization of agriculture challenged the basic risk calculations peasants had been operating for centuries and broke traditional social ties and power relations that provided the basis for the subsistence economy. Wolf argues that all his cases (with the exception of Cuba) had the same starting condition of a large peasantry that was more or less bound to the land. The arrival of capitalism meant that increasingly landholders required more land, which with the growth of the population in each country led to perceptions of scarcity. Other significant variables for Wolf (ibid.: 282-302) include the presence of a central state authority whose power base became rapidly eroded; the presence of middle and 'free' peasants able to be mobilized for revolutionary struggle; and violent peasant rebellion itself, which was carried out to preserve traditional forms of agricultural production.

Wolf's (1969) study is a classic example of the 'most different systems design' (Przeworski and Teune 1970; Faure 1994; Landman 2000) in which countries with very different histories and cultures have the presence of the same explanatory variable (capitalist transformation) and the same outcome variable (social revolution). The lingering methodological problem with this style of analysis is that his dependent variable does not vary. Later studies on revolution compensate for this problem. For example, in States and Social Revolutions, Theda Skocpol (a Perestroikan) compares the 'positive' cases of revolution in France, Russia, and China to the 'negative' cases of social revolution in Prussia, Japan, and England, while examining the effects of class alliances, economic transformation, external pressure, and local politics on social revolution. Geddes (1990) has observed that the inclusion of positive and negative cases represents an advance over Wolf (1969), but argues that Skocpol's (1979) study still suffers from selecting cases on extreme values of the dependent variable. For Geddes (1990: 132-133), selecting on the dependent variable in this way can lead either to an overestimation of effects that do not exist, or to an underestimation of effects that do exist. In other words, a study may claim that a set of explanatory variables is either more important in accounting for an outcome, or may neglect the importance of other explanatory variables.[12]

More recently, Parsa (2000) compares the social revolutions in Iran (1979) and Nicaragua (1979) to the political revolution in the Philippines (1986) while at the same time comparing earlier periods of unsuccessful revolutionary challenges (1950s and 1960s in Iran, the 1960s and 1970s in Nicaragua, and the 1970s in the

[12] In quantitative methodological discourse, these problems are called Type I and Type II errors (see e.g. Kennedy 1989: 70).

Philippines). He thus provides positive, negative, and 'middle' cases of revolution. In similar fashion, Wickham-Crowley (1993: 312) compares the relative fortunes of revolutionary movements in twelve Latin American countries during two successive historical 'waves' in order to identify the necessary and sufficient conditions for successful social revolution. Overall, he compares 28 cases of revolutionary 'winners', 'also-rans', 'losers', and 'non-starters', and like Parsa (2000) is interested in not only why revolutions succeed, but also why they fail. In the conclusion of his study, Wickham-Crowley (1993: 302) cautions that the 'recurring problem for qualitative scholars is how to draw causal inferences carefully, rather than impressionistically', while for quantitative practitioners he warns, '[s]statistical analysis of multiple cases and multiple variables ... provides no sure escape from problems of causal inference.' His study seeks to square the circle by combining J.S. Mill's concepts of the method agreement and method of difference into a comparative matrix of cases and variables suitable for Boolean algebraic reduction (Ibid.: 302-326; see also Skocpol and Somers 1980; Landman 2000: 27-32). By allowing the dependent variable to vary and by providing enough degrees of freedom to examine the combination of his five explanatory variables, Wickham-Crowley (1993) has used a sensible research design to address an ongoing political problem.

While Wolf (1968: x) was originally inspired to study revolution to guide US policymakers to avoid more 'Vietnams', Wickham-Crowley (1993: 4-5) sought to apply what was learned in the many studies on Vietnamese guerrilla activity to Latin America, the scholarly debate on which had ebbed and flowed since the Cuban revolution. Indeed, the 1979 Sandinista revolution in Nicaragua and the insurgent activities throughout Central America during the 1980s cried out for a 'strong comparative body of social-scientific literature on Latin American guerrilla movements and revolutions' (Wickham-Crowley 1993: 5). His analysis of revolutionary successes and failures provides important answers to a series of political puzzles and policy questions. First, it shows that Che Guevara's foco theory, which assumed a concentrated attempt at insurgency was enough to foment revolution, simply cannot be upheld (Ibid.: 313-314). Second, he shows that it is the interaction between popular revolutionary coalitions and the type of regimes they face not merely the presence of such coalitions that is key to revolutionary success (Ibid.: 314-315). Third, the US position that guerrillas in Latin America were nothing more than extensions of the Soviet Union and relied heavily on external support is untenable (Ibid.: 315-316). Fourth, the 'Petras-Kirkpatrick' thesis that the US military suppresses popular mobilization (Petras 1968) and the withdraw of US military in the region 'loses' countries to the other side (Kirkpatrick 1979) is equally untenable (Ibid.: 316-318). Finally, regime weakness is a necessary but not sufficient condition for revolutionary success (Ibid.: 318-319). Taken together, Wickham-Crowley's (1993) study shows how a careful attention to method is directly linked to his substantive conclusions, which provide valuable insights for scholars and policymakers of both the left and the right.

Democratization

Democratic transitions increasingly became the object of comparative inquiry after the end of the Portuguese dictatorship in 1974, an event which ushered in the so-called 'third wave' of democracy in world history (Huntington 1991). The process of democratic transition that started in Portugal would spread to other authoritarian countries in Southern Europe, Latin America, Africa, Asia, and Eastern Europe so that by 1996, there were over 120 'formal' democracies comprising approximately 60 per cent of the total independent countries in the world (Diamond 1999: 24-29). Scholars and policymakers interested in the spread of democracy and its associated normative and practical benefits seek to explain the emergence of democracy in order to encourage its development in those parts of the world where it has not yet taken root (see below and Goodin and Klingemann 1996: 20). The sub-field of democratization studies (Whitehead 1996) emerged from the comparison of few countries as scholars responded to the first democratic transitions in Southern Europe and Latin America. But studies using this method of comparison tend to suffer from two methodological problems that are not mutually exclusive: (1) selection bias, and (2) indeterminate research design. These are considered in turn.

The original series of comparative studies on democratic transition compiled in the Transitions from Authoritarian Rule (O'Donnell, Schmitter, and Whitehead 1986; O'Donnell and Whitehead 1986) by and large focused on instances of democratic transition. Huntington's (1991) Third Wave focuses exclusively on those countries that made successful democratic transitions. Finally, Collier's (1999) Pathways to Democracy compares seventeen historical cases and ten contemporary cases of democratization to examine the importance of working class mobilization on the process of democratic reform. In each of these examples, the dependent variable does not vary. Like Wolf (1969), the studies have identified a political outcome (democratic transition) and have specified a series of explanatory variables for that outcome. Yet, since the dependent variable does not vary, it is logically impossible to derive which (or any) of the explanatory variables are the most important in providing the account. Collier's study is a good example of how selection bias is also linked to the problem of an indeterminate research design.

In all Collier's (1999) twenty-seven cases, the period of democratic reform pushed the countries 'across a threshold consistent with conceptualizing the political regime as democratic' (Collier 1999: 23), marked by an election and the installation of a new government. She is not concerned with the overall durability of the new regime, as many of the cases experience democratic breakdown later on, but she is interested in determining the role of labour mobilization in the reform process. The study is a curious example of selection bias since the dependent variable does not vary (all cases in the sample experienced democratic reform), the choice of countries depends on the outcome that is to be explained (historical and recent cases of democratic reform), and labour mobilization was present in some cases and absent in others. Collier (1999: 167) argues that based on these comparisons labour mobilization is not a 'decisive or even necessary, no less sufficient, factor in democratization'. This finding is in stark contrast to that of Rueschemeyer, Stephens, and Stephens (1992) whose large number of cases includes countries that have and have not experienced democratization, a research design that allows them to demonstrate a large role for labour in the process of democratization (see also Therborn 1977). Her study is thus an example of how an attempt to raise the number of observations (see above) by comparing many instances of democratic reform still yields an indeterminate research design.

Figure 1 depicts Collier's problem using a 2 X 2 matrix that is the product of the intersection between her two main variables: (1) labour mobilization (yes or no), and (2) democratization (yes or no). Her observations only cover half of all the possible combinations in the matrix (i.e. cases of democratic reform with or without labour mobilization). For a definitive rejection of the hypothesis that labour mobilisation matters for democratization, she would ideally have to add cases to her sample that either (1) did not experience democratic reform and had labour mobilisation (Cell A), or (2) did not experience democratic reform and did not have labour mobilisation (Cell B). It could be that labour mobilisation has a negative impact on democratic reform. Without adding examples of either of these two combinations of variables, her analysis suffers from indeterminacy stemming from a selection of cases on the dependent variable.[13]

Figure 1 about here

A study on democratization that adopts a more sound research design is Bratton and van de Walle's (1997) comparison of 'democratic experiments' in 42 Sub-Saharan African countries. In contrast to most of the previous studies on democratic transition, their study compares countries that have made successful democratic transitions (n = 16), 'flawed' transitions (n = 12), 'blocked' transitions (n = 12), and 'precluded' transitions (n = 2) during the period 1988-1994 (Bratton and van de Walle 1997: 120). Such a comparison has several distinct advantages. First, in contrast to extant studies on democratic transition, the dependent variable varies: some countries achieved democratic transition, some did not, while others had less than complete transitions. Second, the large number of countries allows for multivariate statistical analysis to complement their contextual historical analysis of neo-patrimonialism in the region.

[13] Linz and Stepan's (1996) Problems of Democratic Transition and Consolidation also suffers from indeterminate research design as it specifies seven master variables, each with several categories that

Third, their countries all come from the same geographical region, making their comparison fit into the most similar systems design, which controls for shared cultural features and historical legacies while highlighting remaining differences. For example, in their review of neo-patrimonial rule in the region, they distinguish among five different 'modal regimes' that had existed by 1989: (1) plebiscitary one-party systems, (2) military oligarchies, (3) competitive one-party systems, (4) settler oligarchies, and (5) multiparty systems (Bratton and van de Walle 1997: 79).

In order explain the variation in democratic experience across their 42 cases, they construct a model that includes three main variables: (1) political mobilization and protest, (2) political liberalization and constitutional reform, and (3) founding democratic elections (their indicator of democratic transition). They dedicate separate comparative historical and multivariate analyses to account for the first two variables (Chapters 4 and 5, respectively), and then construct a complete model that incorporates the first two variables to account for the third (Chapter 6). In explaining the incidence of political protest, they find strong positive effects for political competition (measured by the number of trade union permitted by the previous regime) and political participation (measured by the number of elections held under previous post-colonial regimes) (Ibid.: 150-151). Together, these two variables alone explain roughly half the variation in political protest. Their analysis of political liberalization demonstrates the importance of a country holding a national conference on reform (a variable that is highly correlated with the incidence of political protest), as well as restricted forms of political competition (as measured by the size of largest parliamentary political party) (Ibid,: 186-188). Finally, they combine the separate

vary across only fifteen cases (see Landman 2000: 155-159).

analyses of political protest and political liberalization to explain the variation in democratic transition. Their combined analysis shows very little effect for economic factors, while demonstrating how democratic transition is a highly contingent political process that is a function of the interaction between military actors and mass protesters, domestic political forces, and the institutionalization of the opposition. Moreover, those regimes that had limited previous experiences with political participation and political competition were more likely to undergo processes of democratic transition (Ibid,: 221-225).

In his review of democratization studies, Laurence Whitehead (1996: 353) argues that 'a political science discipline which offered no systematic or well-grounded approaches to the interpretation of this reality [i.e. the spread of democratic transitions] would be abdicating from an essential task.' In promoting methodological pluralism, Whitehead (1996: 359) argues that 'explaining democratization may require the interpretative skills of the comparative historian at least as much as the logico-deductive clarity of, say, the game theorist'. While he admits that democratization research has not yet delivered on his aspirations, it is precisely an attention to the methodological concerns over case selection and research design that will help the discipline provide the kind of systematic and well-grounded approaches to the problem. Indeed, many of the rational choice explanations for democratic transition provide at best confirmatory case studies (see Colomer 1991; Colomer and Pascual 1994), while comparative historians should be mindful of the pitfalls of selection bias and indeterminacy outlined above.

The substantive findings about the global pace and spread of democracy has been of keen interest to policymakers and ruling elites. Whitehead (1996: 355-356) observes that British elites were interested in the exportation of the 'Westminster' model during the period of decolonization. During the third wave, ruling elites such as Henry Kissinger were concerned about the disruption to world order democracy could bring, while those such as Jimmy Carter were more optimistic for the stability from increased democracy. Richard Nixon and Henry Kissinger were particularly pre-occupied with the Portuguese transition to democracy since the Movement of the Armed Forces (MFA) initially sought to create a socialist alternative to the Salazar dictatorship (see Maxwell 1995). More recently, scholars working on the 'democratic peace' have linked their findings with those working on democratization. Since the international relations work on the democratic peace shows that democracies tend not to go to war against each other, an increase in the number of democracies means a decrease in inter-state conflict. Empirical support for the democratic peace thesis, despite its normative origins in Kantian philosophy, comes from large-N quantitative studies of the kind eschewed by the Perestroikan movement (see Levy 1989; Ward and Gleditsch 1998; Przeworski et al. 2000; Gelpi and Griesdorf 2001).

Neo-liberalism

Finally, it is instructive to consider how the neo-liberal economic policies of the IMF and the World Bank relied on comparative research replete with problems of selection bias (Geddes 1990; Wade 1992; Stiglitz 2002), as well as being heavily influenced by politics and ideology (Stiglitz 2002). In the 1980s, there emerged within the US policy community on international development what became known as the 'Washington Consensus' (see e.g. Drazen 2000: 619). Based on a reinvigoration of ideas found in neo-classical economics, economists and political scientists began to call for supply-side macro-economic policies that reduced the size of the state through privatization and liberalised the economy through deregulation and the encouragement of private sector competition (Todaro 1997: 86-90). Originally adopted in the United States and the United Kingdom during the Reagan and Thatcher years, policymakers in the World Bank and IMF soon turned their attention further afield and prescribed such 'neo-liberal' ideas for developing countries. The evidence for the success of such policies, the neo-liberals argued came from careful analysis of East Asia.

Methodologically, however, the evidentiary base for making such prescriptions was flawed for three reasons. First, in a classic example of selection bias, the original comparisons of East Asian economic success only focussed on successful countries (e.g. Taiwan, Japan, Singapore, and South Korea) (Geddes 1990). Little or no attention was paid to those East Asian countries that had less spectacular economic performance, such as Thailand, Malaysia, Indonesia, and the Philippines (Geddes 1990: 137). Second, the neo-liberals only examined the period of economic development during which export-promotion policies were adopted, and wrongly concluded that such polices were appropriate for other countries (Wade 1992). They ignored the fact that most of these countries underwent long periods of import-substitution industrialization, which relied heavily upon state intervention in the economy. Only after such periods of state-led growth could these countries afford to liberalise their economies. By comparing the period of export promotion in East Asia to import-substitution in Latin America, where the liberalization of their economies was less politically feasible, the neo-liberals wrongly concluded that their polices would have to be enacted in Latin America (Brohman 1996: 84).

Third, any evidence that contradicted the assumptions of neo-liberalism was either ignored or seen as unimportant (Wade 1992). Indeed as Stiglitz (2002: x) argues, ideological and political motivations within the World Bank and the IMF clouded sound analysis of evidence from the developing world and maintained the neo-liberals' hegemony in this policy area. With a 'one size fits all' mentality, Stiglitz (2002) argues, the IMF imposed its model of economic reform on recipient states that were in various stages of economic development. For example, the IMF assumed that taxes provide a more stable source of revenue for the national accounts of developing countries, and any budgets put forward by governments that included revenues from international assistance were not recognised by the IMF as being sustainable. Yet, the comparative evidence showed that international assistance is a more stable form of revenue for governments than taxes (Stiglitz 2002: 29). In many instances, adherence to the Washington Consensus meant that the IMF oversaw trade liberalization without lowering interest rates, financial market liberalization without regulation, privatization without appropriate competition policies, and the imposition of fiscal austerity without due attention to unemployment rates (Stiglitz 2002: 84). The combination of these factors has had a negative impact on the basic living conditions of the world's poorest people.

Maintaining Relevance

In echoing King, Keohane, and Verba (1994), the examples outlined above demonstrate that the logic of inference and methodological problems in quantitative studies are equally important for qualitative research if the discipline seeks to draw substantive and sustainable conclusions about the political world. The quantitative and qualitative examples across the separate research areas of development and democracy, social and political revolutions, democratization, and neo-liberalism, demonstrate that methodological debates concerning case selection and research design are crucial to the kinds of substantive statements about real world problems the discipline seeks to make. Case selection led Moore (1966) to overemphasise the role of violence and the middle classes in the making of democracy, Wolf (1969) to concentrate only on the commercialization of agriculture, Collier (1999) to discount the role of labour mobilization, and the neo-liberals to privilege one model for economic development. As Geddes (1990: 149) rightly observes:

> Speculative arguments based on cases selected on the dependent variable have a long and distinguished history in the subfield [i.e. comparative politics], and they will continue to be important as generators of insights and hypotheses. For arguments with knowledge-building pretensions, however, more rigorous standards of evidence are essential.

Pennings et al. (1999: 4) are equally forceful in claiming that without a proper research question and research design, comparison 'becomes meaningless and - which is worse - may lead to dubious evidence on which existing policies may be changed that affect many in society.' Indeed, the example of neo-liberal economic policy and its shaky evidentiary base shows how 'dubious evidence' can produce dire results (Wade 1992; Brohman 1996; Stiglitz 2002).

The Perestroikans are thus wrong to either divorce method from substance or to lessen its importance, since as this article has tried to demonstrate, <u>good method produces good substance</u>. But good method does not necessarily mean numbers, parsimonious and elegant models, and sophisticated statistical analysis. Good method means intellectual honesty about what we are studying and how we are studying it, including meaningful and important research questions, careful theorizing about possible relationships and explanations for observed outcomes, well-thought out research design, fair collection and presentation of evidence, and logical inferences drawn from that evidence. Method is thus intimately linked with our research questions and our answers to those questions. Only by maintaining that link can the profession continue to make a contribution to political knowledge and provide solutions to political problems.

		Democratization	
		Yes	No
Labour Mobilization	Yes	Observed cases	A
	No	Observed cases	B

Figure 1. Logical combination of two variables in Collier (1999).

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