# 12

# Comparison: A Foundational Approach in the Social Sciences

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## Introduction – A Paradoxal Situation

While comparative research is on the increase at the initiative of national and international organizations, we might be surprised at the relative lack of methodological and epistemological reflection on this approach. Very often, so-called comparative studies consist in a juxtaposition of national monographs, leaving it to the reader to proceed with their comparison. This situation is all the more paradoxical in that the founding fathers of social sciences – whether it be de Tocqueville, Durkheim or Weber – made comparison an essential heuristic approach. In *Rules of the Sociological Method* (1895) Durkheim exclaimed: "comparison is sociology itself." It would seem important to go back over the principles and the issues of a comparative approach.

This approach seems all the more stimulating in that it is characterized by great diversity: comparisons over time (over several decades or centuries, like Weber working on the formation of the modern State, or Elias analyzing the "civilization of mores"); in space (between countries, federated states, regions, cities), but also between sectors of activity or study of the impact of social and political determinants of certain practices (voting behavior, unemployment, or leisure activity, for example, studied according to the social origin, educational level, profession, etc.).[1]

At the same time, we note a change in the issues of comparison. In the 1960s, attention given to this approach was inseparable from the desire to assert the superiority of the western economic and political model, particularly in political science (Almond, Verba 1967), but also in demography and economics (Rostow 1963). In sociology, this revival is associated with the rediscovery of the founding

fathers. Today, globalization (through supra-national organizations like the United Nations, International Monetary Fund, etc.) and the construction of regional entities (whether it be European construction or free-trade zones) are indisputably a driving force behind the development of comparative research. In such a context, comparison is a privileged tool of investigation to analyze transformations of the modern world (Lallement et al. 2003:9).

This article, designed to open the tool box of the specialist in comparison, will be mainly devoted to questions which are raised before comparative research. Before undertaking this, we first need to ask what this approach can bring to the identification of the characteristics of a comparative approach and its issues: (1) Insofar as all research is influenced by social, political and historical factors, it is up to the researcher to identify them in order to distance himself from them; (2) The main concepts and the problem, developed simultaneously and jointly with the first comparisons in the field, are the "compass of the specialist in comparison"; (3) Various comparative strategies can then be implemented – pragmatic or theoretical, determined *a priori* or during the research, according to the observation and analysis scale chosen and methods implemented; (4) Although these comments are so many warnings or methodological preconditions ("tricks of the trade": Becker 2003), the implementation of a comparative approach always includes a significant amount of tinkering, as in all research, according to the concrete, methodological or theoretical difficulties encountered. We see that reflecting on comparison means going back more generally to the approach of knowledge production in the social sciences and to some major questioning: the tension between the general and particular, between indexation on context and abstraction; the link between the micro, meso, and macro levels, etc.

## Comparison: To What End?

Although this question is indispensible, it seems to be too rarely raised. However, beyond the effect of mode, we should think about the relevance and importance of conducting a comparative study, by wondering what a comparison adds that research on a single field would not allow us to observe. Furthermore, comparison is often envisaged starting from the formulation of the project, even before beginning research. Yet, the question of the appropriateness of implementation of a comparison is also often raised during research. Indeed, a researcher can research in a field, and develop hypotheses, then ask if they are relevant for only the case studied or if the explanatory model drawn up is more broadly valid, and then work in other fields to test its relevance. It is always possible, even after having completed the basics on the ground, to analyze data collected to examine it comparatively.

### *What is comparison?*

Giovanni Sartori (1994:22) starts from a simple example to define comparison. He asks to what extent apples and oranges are comparable. In his mind, judging the relevance of such a comparison requires asking, "comparable with respect to which properties or characteristics and incomparable (for example because of too many differences) compared to which other properties or characteristics." He concludes in a first analysis: "The important thing is to remember that comparing is both assimilating and differentiating with respect to a criterion." Thus comparing is, in a first approach, to highlight differences and common points according to a criterion which should be defined from the beginning and which directs the attention of the researcher. This operation is then not part of the evidence, but is the subject of a construction.

Moreover, comparison is not only a technique or a methodology;[2] indeed, the specialist in comparison is likely to mobilize a great diversity of qualitative and/or quantitative methods. Comparison is more broadly a research strategy which permeates the whole approach of the researcher, from the definition of the problem, to the choice of field, the construction of data, their analysis and explanation. Rather than a set of tools, this is an intellectual stance,[3] which encourages us to move away from the center and which has no disciplinary boundaries.[4] This "detour of knowledge" (Lallement 2003: 107) is a "systematic comparison of modes of construction and evolution of the same social fact between national spaces," but also over time, between sectors, etc.

Systematic comparison in the social sciences, concerns three main dimensions: the actors, institutions and categories mobilized. For each of them, the synchronic (at a given moment) and diachronic (inscription in the long period of their constitution) dimensions should be considered in such a way as to highlight the effects of sedimentation and historical dynamics. Thus understood, comparison invites us to put processes and trajectories in perspective. Moreover, the specialist in comparison should not consider isolated elements, but pay attention to the way different parameters that he identifies as characteristics of the social fact studied in a given context lay themselves out specifically. He shows configurations and the way in which they are transformed. Finally, insofar as the comparison is a construction of the researcher, this operation requires a reflexive attitude, namely the ability to step back to reflect on conditions of categorizations that he is creating and procedures of analysis that he is implementing. Attention to process and to configurations and reflexivity on his position are the key words of the specialist in comparison.

### *Issues of the comparison*

This suggestion of creating some space with respect to what the researcher knows is precisely one of the first issues and contributions of the comparison (see Table 1). In a system that we can qualify as epistemological, in the comparison with societies where the fact studied appears differently, it is important to break with prejudices and preconceptions (Durkheim 1981 [1896]) or with ethnocentrism (Boas 1968 [1896]), in becoming better aware of the status of the social, political and historical construction of this fact. Comparing also enables us to better understand. This can be a descriptive objective pursued in itself or with the concern for "learning lessons from it" – like de Tocqueville studying American democracy with the objective of better understanding the political transformations taking place in France (1986 [1850]).

**Table 1 – Objectives and Systems of Comparison**

| Objectives | System of Comparison | Issues |
|---|---|---|
| Distancing | Epistemological | Break with ethnocentrism. |
| Better understand | Descriptive | An objective in itself or the desire to "learn lessons". |
| Classify, order | Explanatory | Suggest a typology of facts observed |
| Generalize | Theoretical | Find social regularities and main factors. Produce an explanatory model. |

Classifying and ordering can be the third objective of a comparison. In this case, the researcher often attempts to produce a typology of observed facts. This effort at clarification of thought by sequencing of reality is often a precondition for explanation. But it is not pas always devoid of value judgments, especially when the classifications realized are part of a practical and political objective of administration or when they go along with the implementation of public policy. The debates on typologies of welfare states proposed by G. Esping-Andersen (1999 [1990]) – considered as promoting the Scandinavian model and not sufficiently taking into account the question of gender (Jenson 1997) – are there as a reminder. Finally, comparison is often aimed at generalization. In this case, it is a matter of finding social regularities as well as the main factors which influence the social fact. The issue is to produce an explanatory model. Comparison can then be mobilized as a substitute for experimentation (this was the great hope of the founding fathers) and as tool to test hypotheses.

For M. Dogan and D. Pélassy (1982:185), typology and model are both a "synthetic conclusion capable of inventorying, clarifying and systematizing the results

of the comparison." But they first differ in their unequal explanatory power: typology organizes the universe, based on a rather descriptive analysis, whereas the model explains reality based on an analysis of the causal type. Furthermore, these two tools differ one from the other by there more or less great ability to analyze change: while the former corresponds to a static perspective, the second is part of a dynamic approach. "The model includes movement; it is not pure chance that contemporary research is more directed towards this pattern in action than towards too rigid actions [...] whereas typology tends to freeze the reality what it wants to synthesize, the model attempts to perceive the way in which the process unfolds over time. Typology compares several stages of social and political development. The model films the change itself, but not without this quest raising some problems" (Dogan and Pélassy 188). Finally, whereas typology tends to respond to a concern for exhaustivity,[5] the model is more characterized by its selectivity. These two types of formalization of results fulfill different requirements results, all the while showing a concern for rigor.

**Identifying the Social and Political Issues to Distance Oneself from Them**

At the same time, the specialist in comparison cannot neglect reflecting on social and political factors which influence his work. As Michel de Certeau stresses (1974:21), "a subject has a history and all research […] is based on a place of socio-economic, political and cultural production. Research involves an environment of development that is defined by tidy determinations […]. It is subject to constraints, linked to privileges rooted in a particularity. It is according to this place that methods are established, that a topography of interests is defined, and that matters and questions to ask of documents are organized." The researcher is called on to exhibit critical vigilance: "all human science should introduce the suspicion of its own development to question its historical relationship to a social type. It goes hand in glove with a form de culture. In order to redefine itself, it should proceed with a dissenting analysis of the civilization that it posits. Between a society and its scientific models, between a historical situation and the intellectual baggage which is suitable for it, a relationship exists which is a cultural system" (de Certeau 1980:166-167). This caution comes in four ways: in questioning the relationship of the researcher to his subject; in distinguishing systems of expertise, research and social debates social; being aware of the political stakes of the comparison and avoiding the introduction of cultural biases.

***Questioning the researcher's "relationship to values"***

Weber was already urging this call for vigilance in "The Objectivity of Knowledge," by encouraging the researcher to wonder about his "relationship to values." This relationship to values is perceptible in the choice of subject, the way of understanding it or the selection of factors judged to be important – so many

more or less conscious preconceptions linked particularly to the origin (social, ethnic, national, etc.) of the researcher, his education, his sensitivity and his period. This is what would explain that faced with the impossibility of rendering an account of a fact in its global nature and all of its complexity; a single phenomenon can be analyzed in a very different way, depending on the point of view adopted. These unavoidable choices are not neutral. This is why the specialist in comparison should become aware of their subjectivity (which is not arbitrary for all that, if it is justified).

This reflexivity does not mean to lose ones values, but to be aware of them to overcome as mush as possible the impact that they can have on the formulation of problems, the direction of the viewpoint and the conclusions of research. Thus, the researcher should always identify the various issues: scientific, political or those on the agenda for public debate. It is also useful and necessary to objectivize his own social position with respect to research subjects or to possible backers. This "double work of clarifying prejudices and of objectivization of [his] position" is called "auto-analysis" by Florence Weber and Stéphane Beaud (1997:26). These authors recommend, before even beginning the research and all throughout, to think about exact, concrete factors having encouraged the researcher to choose his subject rather than another, often linked to his personal career, his education, etc, but closely dependant on the intellectual, social or economic context which he is in. Likewise, they also recommend thinking about themes which were first excluded.

It is for this reason, according to B. Jobert (2003) that is impossible to claim that comparison in the social sciences has the same status as experimentation in the natural sciences, because it greatly depends on the observer, his value system, theories that he uses, the scale where he places himself, the means that he adopts.

### *Distinguishing between systems of expertise and those of research*

Numerous social and political determinations influence this work. Comparison is indeed "a reality constructed institutionally, politically and scientifically" (Commaille 2000:111). This is why the researcher should attempt to establish a distinction between the expertise forum, the knowledge forum and the media-related forum (see Table 2).

**Table 2 – Types of Forums and Issues**

| Types of fora | Issues | Objectives |
|---|---|---|
| Research forum | Scientific | Objective of knowledge |
| Expertise forum | Political, sometimes ideological | Concern with action |
| Social forum | Social and media-related | Mobilization in debates or controversies |

J. Commaille (2000) suggests that we distinguish two dimensions. In the research forum, research would be conducted with the objective of knowledge, while the expertise forum would be characterized by a concern for action according to which the comparison "would consist principally in attempting to find convergences and divergences." In this latter case, the study is explicitly directed according to a demand, whether it be from a national public institution (a ministry, for example) or an international institution (World Bank, Organization for Economic Cooperation and Development, etc.). According to J. Commaille, there is a growing confusion between the research and expertise fora, particularly in the framework of research encouraged by the European Union or other international organizations. This may contribute to a blurring of the status of comparison. Thus, a number of European studies are based on the *a priori* hypothesis of a convergence between European countries without, however, showing it.

In a yet more critical way, F. Schultheis (1990:227) stresses particularly the influence of "the social demand" on comparative studies, stigmatizing "the specificities of the social use of the currently dominant intercultural comparatism: produced by scientific specialists (statisticians, economists, etc.) based on a public demand from an international institution, endowed with all the symbolic qualities of both scientific and political credibility and made 'official' before becoming 'public', the information given becomes an issue in political discourse, capable of fulfilling the strategic functions attributed to it." The danger of such comparisons lies in the public issue that they constitute, particularly ideologically speaking. The comparative approach of the expert is directed – and sometimes biased – by the concerns coming from an institution, which already provides a problem which is not necessarily the most relevant.

But this orientation towards practical objectives can also been seen in research which is not explicitly ordered by international institutions, but which is aimed explicitly at identifying best practices ("*benchmarking*" method; Bruno 2007). Although it is perfectly legitimate to consider that research in the social sciences can contribute to improving knowledge on contemporary societies and better take into account the challenges with which they are confronted, at the same time, the

concrete study protocol will be different depending on whether it aims to understand what is or tries to determine what should be. The risk is then great to stick to the single normative dimension. This is what we could qualify as "technicist biases."

Moreover, we should add a "social forum" to these two fora which would correspond to social and media debates in which research (specifically quantitative), is mobilized, often in a polemic fashion. There is no death of examples: the evolution of the academic level, the question of social mobility, or the pauperization of a part of the society. Yet, whether their authors want it or not, work in social sciences on these themes or the data that serve as bases for them will be used as part of these controversies. Researchers who work on these subjects cannot forget it. A particular status is given to comparative research results, used in their most simplified formulation by the media, without considering the limits that the researchers themselves ascribe to their study and their analyses (Blum and Guérin-Pace 1999).

Finally, it is important to stress that these fora are not airtight, that their boundaries are blurred, and all the more so in that some actors (researchers, political actors) speak in these various fora – either at the same time, or throughout their careers. For example, some researchers who work on schools are approached to participate in various national or European decision-making bodies with expertise on educational reforms. They are also regularly called on to speak in the media, to explain the stakes involved in such or such program change, pedagogy, teaching methods.[6]

### *Being aware of the political stakes of comparison*

Among the stakes in which comparative research is inserted, some stress their particularly political or even geo-political dimension. In the context of globalization and Europeanization, we indeed observe a boom in borrowing and transfer practices.[7] "The process of production of frames of reference is becoming internationalized; states' fight to impose their own vision of the world is becoming more crucial. The development of international comparisons is a part of this search for hegemony" (Jobert 2003:325).

As a result, the specialist in comparison should be twice as careful, particularly at the start of his work. He should identify the demands of the institution which is placing the order, and more generally understand the social and political stakes associated with the theme addressed, reformulate the subject of research by distinguishing between questions of expertise (the implicit or explicit social demand) from research questions by reconstructing the research subject based on scientific concepts and questions; and finally, giving the framework and specifying the limits of generalizations and conclusions which can be drawn from them. The controversy in the French academy on the new ministry of immigration and national identity are

illustrative of the influence of such socio-political stakes. This debate particularly revolves around appropriateness of accepting financing from this Ministry. To what extent does doing so run the risk of influencing questioning and research directions on immigration, but also encouraging the political appropriation of research which will have been conducted on this theme? Others consider that it is all the more dangerous to only give the floor to researchers who are politically close to power. Finally, others campaign in favor of the development of research on these themes without financing from this ministry. The debate is on in France. But all researchers are led to question the possible influence of the backer and his (implicit or explicit) expectations on research results. Despite all of this, there are numerous successful examples of sociological recasting.[8]

### *Be vigilant vis-à-vis the risk of introducing ethnocentric biases*

Finally, another pitfall often threatens international comparisons, that of the ethnocentric approach. This risk requires that the specialist in comparison be extremely vigilant with respect to what goes without saying and to distance himself from what is familiar – in such a way as to avoid introducing cultural biases (...) In another form, we find the Durkheimian warning with respect to preconceptions (Durkheim 1986 [1895]).

The first form of ethnocentrism is found in a formulation of the problem too rooted in a particular culture: "when the intercultural comparison consists in studying other cultures, a question which has arisen in the context of a particular culture, it is rare that it proves to be really intercultural. This sort of project leads to a style of cooperation for which Adam Schaff used the aggressive expression "colonialism of research" (Scheuch 1967, cited by Dogan and Pélassy 1980: 32).

This tendency is seen particularly in international research designed by generalization of a study first conducted in a single country, then extended to others, without reworking the initial framework of analysis, questions, and methodological framework. The risk is again great when the realization of the study is delegated to national teams (who are principally involved in translating the questionnaires, their editing, and data transmission). Although the concern for obtaining comparable and homogeneous results is legitimate, it does not always translate into the development of relevant procedures, in encouraging the building of fairly strict and similar research protocol in all countries studied (with respect to the way of writing questionnaires, coding responses). The risk is then that the results do not assume a real relevance.

An international investigation into illiteracy provides a good example of this. This assessment conducted in the 1990s is based on the comparison of results of tests designed with the help of an indicator of "literacy", created to designate abilities of reading and comprehension of texts in daily life (classified into four levels of difficulty). The results, immediately contested by the French Ministry

of National Education, indicated that "three quarters of French people have a level of ability in terms of literacy which does not allow them to conduct activities in daily life: read a newspaper, write a letter (...) " (Blum and Guérin-Pace 1999:274). Alain Blum and France Guérin-Pace identify two main sources of errors: different levels of difficulty for a single question following the translation (whereas the hypothesis of the universality of the scale of difficulty of tests is posited) and the existence of geographical and linguistic differences. Indeed, they show (with the help of an ascending hierarchical classification) that test results are closely correlated with the linguistic or cultural proximity with the United States and Canada, and more generally with Anglo-Saxon countries. The authors show that cultural biases call into question the very design of the research, inspired by the American experiment, the *National Adult Literacy Survey*: "The main criticism which can be directed at the research (...) is precisely to be based on the idea that there is a single model of society." As a result, the implementation of multinational teams during the development of a research framework and during the research[9] appears very successful in reducing the existence of such biases as much as possible.

As a result, the ideal position of the specialist in comparison (as for all researchers), is probably more similar to that of the foreigner, skillfully described by Simmel (1999 [1908]). According to him, the foreigner is characterized by the tension between proximity and distance, between empathy and freedom of judgment, critical distance – so many qualities to cultivate. Furthermore, we should note that although the risk of an ethnocentric approach can rightly be understood as one of the major pitfalls in the comparative approach, it is also one of the benefits of comparison to allow this distancing with what seems obvious to us and encourages reflexivity.

## Concepts and Indicators: The Danger of Term-for-term Comparisons

In comparative research also, concepts and problem make up the centerpiece of research. Their definition constitutes "the compass of the specialist in comparison" (Dogan and Pélassy 1982). This is what will next allow us to possibly develop ideal types and to choose relevant statistical indicators.

### *Concepts, the true "compass of the specialist in comparison"*

Main concepts provide meaning for the comparison. Insofar as the social facts are particular social, historical and political constructions, peculiar to each country (indeed to each region, professional group, etc.), the phenomenon studied should be the subject of a work of (de) construction. This means avoiding term-for-term comparisons and those which are based only on terminology. The same word can indeed cover distinct realities. This difficulty is increased when the languages of the countries studied differ. Thus, it is sometimes difficult to find an equivalent for the French term "cadre" (in Germany, for example). This reminds us that the

category of "cadre" is indeed the result of a socially situated historical construction (Boltanski 1982). It is important to deconstruct categories in order to see what they are concealing[10] : this is in itself a major stake of comparison. In this sense, comparative analysis plays another role, because it enables the researcher to avoid naturalism. Indeed, the fact of observing that "elsewhere, things are different" is a rampart against the illusion that the phenomena which surround us are "natural." Comparison then allows us to surpass the evidence, the "it goes without saying." Because, as E. Durkheim stressed (1975:147), "doing comparative sociology is not simply pulling together a bit hastily all sorts of materials: it means first providing the critique of them, and then submitting them to a development as methodical as possible."

A rigorous definition allows us to compare *a priori* very distinct subjects. Thus, for example, what is comparable at first glance between the magistrate, the elementary school teacher and the nurse? This would seem to be a "comparison of the incomparable." In his work on *The Decline of the Institution*, F. Dubet (2002) shows that these different professionals, but also social workers, mediators, high school teachers and trainers for adults, participate in what he calls "work on others," defined as "the set of professional activities participating in the socialization of individuals." These professions are based on an "institutional program," characterized in France by its exteriority (they refer to values which are defined as outside of the world, in the way of an opposition between sacred and secular levels), the dynamic of the vocation (which resistance to professionalization renders an account of) and the tension at the core of socialization meant to construct a subject which is both socialized and autonomous. This is the definition of this concept which creates the relevance of such a comparison and its ability to analyze in the most general way the current transformations of institutions. Likewise, the concept of repertory of collective action, mobilized by C. Tilly (1986:541) to designate "ways of acting in common on the basis of shared interests," allows us to compare both in space and time phenomena which are, *a priori,* very different – from peasant uprisings of the 17th century to anti-globalization protests to strikes and election campaigns.

The degree of specificity of concepts differs depending on the extent of the comparison. This is what G. Sartori (1994) designates under the term scale of abstraction.[11] The principle is the following: the more a concept is indexed on a particular case or field, the more it is defined by specific characteristics; the more the researcher wants, on the contrary, to extend it to other case, the more the concept loses its specificity (and the less the definition of the concept will include specific characteristics). Although they do not use such an image, Barney Glaser and Anselm Strauss (1967) also stress the necessary despecification of a concept to describe and compare a larger set of facts. They take the example of the end of life as an "unpredicted change in status." This conceptual category includes the

following properties to characterize the status of the dying: it is an almost inevitable transitory situation (except for sudden death) which can occur at different ages and stretch out over a duration which is also variable and which, in western countries, is more and more often taken care of in medical institutions. If the sociologist is only interested in terminal cancer patients, he can characterize this situation in an even more specific way. If, on the contrary, he wants to extend the field of analysis to all situations of passage between two statuses, such as "youth," engagement, the fact of being a prisoner, etc, he will qualify this concept in a more general way. It is up to the specialist in comparison to define his position on such a scale of abstraction, according to his objectives and the number of cases studied.

The definition of the exact research subject and the development of a problem – essential steps – thus go hand in hand. Moreover, there is always a back-and-forth between the theoretical construction of the subject and the comparison with the field or fields. To render an account of this continual dynamic, D. Cefaï (2003) speaks of a "spiral of research."

### *Ideal types: stylization tool of the social fact*

From this perspective, we can understand the importance that Weber accords to ideal types which are designed to clarify the main characteristics of a phenomenon and its variants according to cultural, historical and social contexts. The ideal type – "the non-contradictory cosmos of thought relations" (Weber 1965: 179-180) – gives a synthetic résumé, without claiming to include or render an account of the social reality in its totality. For Weber, it is neither an issue of a description of reality, nor of a hypothesis, but of a selection of particularly characteristic traits of the fact studied. The sociologist stresses empirical variations and the relative character of example defined which are often combined in reality. "We obtain an ideal type by accentuating unilaterally one or several view points and by threading together a multitude of phenomena given separately, diffused, and discreet that we sometimes find in small numbers and at times not at all, that we order according to the preceding points of view chosen unilaterally to form a tableau of homogeneous thought" (Weber 1965:196). This "analytic construction" is a fruitful heuristic instrument for the specialist in comparison.

Thus in his work, each social configuration (Protestant or Confucian ethic, market economy, etc.) or process of civilization (modes of political or religious legitimization, and the passage from one to another) are stylized by some of their main characteristics. By the comparison between two ideal types or the comparison of an ideal type to the historical reality, the objective is to establish relations of causality or "elective affinities" between certain parameters thereby located, as well as tendencies towards change. In the "Introduction" to *Economic Ethics and World Religions* (1996 [1915]) for example, Weber identifies three types of domi-

nation, depending on the foundation of their legitimacy. Traditional domination is founded on respect for what has always been (actually or supposedly); ancestral traditions are the guarantor of the legitimacy of rules and authority. Legal-rational domination is based on conformity to the rules of law. The modern bureaucratic state is the purest example of this type of domination; an impersonal norm defines the competence of the civil servant and the extent of his power, characterized, moreover, by the separation between public and private spheres. Finally, in the case of charismatic domination, individuals submit to orders or rules stated by a chief, by virtue of the sacred or exemplary character with which they invest him, whether he be a religious prophet or political leader. Domination is not exerted according to general norms or those from tradition; it is revolutionary.

The definition of these three ideal types allows Weber to more precisely analyze concrete governments (knowing that reality often corresponds to a combination of these types of domination) and especially to describe the passages from one type of domination to another. In the past, change in domination was often achieved by alternation between traditional and charismatic authorities. Weber shows that these are the processes of material rationalization (of administration and justice "by a prince who satisfies his subjects from the practical standpoint and that of social ethics", p. 374) and formal rationalization (domination by legal norms) which have enabled the accession of a legal type of domination and bureaucratic domination. Bureaucracy is characterized by a particular type of man, professional lawyers, to whom a role and duty are attributed, and whose competence is defined by impersonal norms established rationally.

### *Statistical indicators and categories: an often problematic form of comparability*

Tables of computed data are probably the most obvious form of comparability (and potentially the most "dangerous" since they are seemingly objectified in the form of statistical categories); this is why the statistical comparison requires the greatest caution and rigor. The statistical monitoring approach should include both a critique of the quality of indicators (with respect to their construction and reliability) and a critique of the use of indicators, a concern of for contextualization and attention to effects of temporal discrepancies. The specialist in comparison should take into consideration the context in which the phenomenon studied is inserted, as well as the context of data production.

On the one hand, statistics sometimes conceal different realities. For example, Eurostat data on family benefits exclude in the case of France certain "fiscal benefits" (reductions in taxes ensured by the family quotient) and "housing benefits" which, however, contribute to the well-being of families. The comparison of unemployment rates (Maruani 1996) is also a good illustration of this. Not only are there three international definitions of unemployment, but different contin-

gent parameters (such as modalities of indemnification of men and women) influence the rate of registering as unemployed. If married unemployed people are clearly more numerous to receive indemnification than single unemployed people, and this is true in all countries, on the other hand, the situation is more complex for women. Systems of indemnification unfavorable to married women in Great Britain, Ireland, the Netherlands and Germany contribute to classify some of them outside of the workforce, as their unemployment gradually continues over time. From then on, only the comparison of percentages of unemployed individuals, without taking into account factors which influence their definition, can lead to erroneous interpretations. The researcher should then reflect on the modalities of construction of statistical categories and more generally on "the share of the social norm which, beyond rules for indemnification and enrolment in the unemployment system, pushes women to call themselves unemployed or define themselves as inactive". As a result, the qualifier of unemployment or outside the workforce is not only a question of statistical counting but has a sociological foundation. These examples stress the danger of synthetic comparisons denounced by F. Schultheis (1989).

On the other hand, "everything else being equal" comparisons are not without their problems. The "everything else being equal" hypothesis is particularly the foundation of the analysis of regression. We then construct a model without interaction.[12] François Simiand (1903) already indicated about economic comparisons, that statistical requirements come back "to wondering how would a camel live if, remaining a camel, he were transported to the polar region, and how reindeer, if they remained reindeer, would live if they were transported to the Sahara." This is why categories and statistical relations should be made explicit compared to the social and historical context.

The researcher should also reflect on the mode of construction of "samples" on which he works in order to beware of the "trompe-l'oeil of a sample," to use Jean-Claude Passeron's example (1991:123): "most populations on which measures operate and in which we take a "representative sample" are already prefabricated samples by a social process." Indeed, these populations are the result of a social and institutional action; for example, populations of university students are the result of the selection made by academic institutions which precede the university. Questioning on the mode of construction of the sample also concerns the groups which are seemingly "natural" (such as groups of readers, etc.). The objective is to limit the dangers of "rampant induction" in interpretations concerning the influence of sex, age, class, ethnicity, etc on the propensity for culture, illness, crime. The researcher should be particularly attentive to the phenomenon of categorization by institutions, whether it be school, hospital, or police (Aubusson de Carvalay 2002; Mucchielli 2002). These problems refer to the research method (collection and construction of data, development of research protocol, etc.) as well as the rigor of the interpretation of figures and categories.

"Social demand" also has an impact on the data collected through the choice of the definition of the subject and the socio-political context in which the research is conducted. As A. Desrosières (1996) stresses, the fact that a question – such as the mistreatment of a child – becomes socially and politically sensitive (i.e. the fact that it is a public action), transforms its statistical status. "Tracking procedures (toll-free numbers), recording and counting are put in place. Definitions and criteria are formulated. When this operation is still recent, interpreters hesitate between two readings: the number of mistreated children has increased or observation procedures have improved. We already observed this hesitation with respect to unemployment in the 1960s, with the progressive implementation of the National Agency for Employment (ANPE, in its French acronym). This makes commentators, who cannot convince themselves to renounce realistic rhetoric and criticize the uncertainties of the system of observation which cannot provide them with reliable figures […] ill at ease. Reliability is closely associated with stability and the routinization of the chain of recording and counting, which implies that the subject has become less of a burning issue." Thus, as the socio-political context and media-related topicality have an impact on the statement and collection of data, interpretation over time of evolutions of certain facts should be carefully conducted.

By drawing attention to the dangers of certain statistical comparisons, we are not, of course, casting doubt on analyses of this type, but stressing the necessary vigilance of the researcher and the methodological precautions to take. Comparison allows us to relativize categories of analysis, which are often assumed to be natural, whereas they are social constructs (Maurice Sellier and Sylvestre 1982:107-108).

## Some Comparative Strategies

At this stage of research at the latest, two main questions arise for the specialist in comparison: which cases to compare and how many? According to which criteria are these choices made? We present below some of the modalities of selection, without any claim to providing an exhaustive list.

### *An often pragmatic choice*

It is most often a pragmatic choice which prevails in the selection of such or such country. Here are some of the criteria which, consciously or not, have an influence on the choice. The first is without a doubt the country of which belongs.[13] Institutional factors play a crucial role, among which we could include the sources and conditions of financing, whether it be special partnerships with certain countries (for example, in France, much comparative research includes Germany, a fact that we can relate to the existence of institutional incentives and financial systems, like the Interdisciplinary Center for Study and Research on Germany (CIERA) or European financing (in this case we find conditions with respect to

number and geographical diversity and in the size of countries to be included in the comparisons). Knowledge of the language and affinities with certain cultures, or access to research fields (geographical distance, financial cost) influence the selection of units. Moreover, most comparisons are marked by the national framework (despite the context of reconsideration of the state from the top – deployment of supranational organizations – or from the bottom, with regional development and municipal structures.

There is no doubt that numerous practical considerations come into play in the choice of countries, even if theoretical justifications are then advanced to justify it. It is merely important to take care that this choice does not constrain the definition of the subject too much – at the risk of later hindering the research.

### *Two main ways of choosing countries to compare*

Among the multiplicity of types of comparison, two main modalities of selection can be distinguished: depending on their degree of proximity of point of view with the issue or the method of "theoretical sampling."

*Choosing the units to compare depending on their degree of proximity*

A. Przeworski and H. Teune (1970) distinguish two strategies of comparison: between "the most similar systems" and between "the most different systems." In the most similar systems strategy, the researcher studies units as similar as possible, except on the factor studied. Similarities must be ignored to explain the differences. Inter-systemic differences are considered as explanatory variables. The Weberian analyses on Protestantism, comparing several strains of Protestantism and their effects on the relationship to the world and the implication the economic universe are a good example.

In the strategy of the most different systems, the only thing that is important is the common points between the contrasted countries. Thus is the case in Weber's analyses on China and the west, on Protestantism and Confucianism*:* Weber attempts to understand the particularity of the development of the state and capitalism such as we have only seen in Europe, whereas conditions were also ripe in China which could have contributed to the emergency of a modern capitalist economy. A subtle comparison of Protestant and Confucian ethics enables him to locate favorable factors and those which have created an obstacle. Skocpol's book (1985 [1979]), which analyzes the revolutions which occurred in France, Russia, and China, illustrates perfectly the system of comparison between "very different countries." The author wonders about factors which explain that beyond national, cultural and chronological differences, revolutions took place in these countries. She offers the hypothesis that these three revolutions go back to the same explanatory mechanism: the monarchical state founded on an agrarian society, crisis between the state and the dominant class, the state confronted with an

international crisis. The literature grants the methodological and epistemological primate to this type of comparison (see also Détienne 2000) – probably because it requires an increased effort at abstraction and analysis, and even if it is not the one which is the more widespread.

It is also possible to combine these two strategies, for example in choosing three countries, two resulting from a comparison between similar cases, two between different cases. This is what David Laitin (1999) did in the framework of a study of nationalist movements. His objective is to understand why some of them had recourse to violence. The researcher first makes an initial comparison, within the same national entity, between Catalonia and the Basque. By highlighting the factors which distinguish the two regions and nationalist movements, he constructs a model of micro-analysis which he then tests in transposing his theory to differences between Ukraine and Georgia. The combination of these two strategies allows him to strengthen the force of the theorization. After showing the insufficiency of macro-theoretical explanations (historical, in particular) to understand the recourse to violence, or lack thereof, the author identifies a group of favorable "micro" factors: a dense rural social structure as a necessary condition; a phenomenon of tipping game (return to the use of the regional language, for example, as incentive factor) ; random events, such as visible victories without the costs really being so (as the exit costs of the nationalist organization and the culture of violence).

We should note that here we have a choice which is made from the outset of the research; the categorization as "similar" or "different" is made based on ideal types. It is precisely this *a priori* of the comparison that other researchers dispute.

*Choosing the cases to compare based on the theoretical sampling method*

B. Glaser and A. Strauss (1967) recommend the choice and systematic analysis of several groups of comparison, according to a method that they call "theoretical sampling." For them, the comparative method is a privileged way of producing a theory and it is this objective which should guide the choice of cases. Various stages are set out. Research begins by the in-depth study of a field and the development of relevant categories of analysis. A first level of comparison is developed by the systematic comparison of facts observed in the same place. Then, to specify categories developed from this first field, the researcher is invited to research systematically the "negative cases," i.e. situations presenting opposite characteristics. If a comparative approach is envisaged from the beginning, on the other hand, the choice of situations to compare is only made during the study, after data collection on a case, according to the needs of theorization and not *a priori*.

Studying the dying, after observing a first department, B. Glaser and A. Strauss (1965) compare the end of life in a newborn department and in a geriatric department (with respect to criteria of age and of the ordinary or unordinary

character of the end of life). Progressively, this researchers extended the comparison to a group of varied situations : various departments in a same hospital (pediatric and geriatric, oncology and emergency, with respect to the duration of the process, etc), different types of personnel in the same department (nurses, doctors, hospital porters, housekeepers, etc.), in public and private hospitals, the end of life in a hospital setting or in another context, different regions of a same country, the United States (where the seriousness of his state is normally hidden from the patient) and Japan (where the patient is made aware of his situation), etc.

By increasing the number and diversity of cases, phenomena can be noticed that were not spotted in the more familiar cases first studied. For example, the role of families had not been systematically studied in American hospitals. Families are unequally approached by medical personnel, depending on the location of hospitals (in the city or country), regions, countries, etc. It is this dynamic process of continual back-and-forth between field work and theory which enables us to develop a scientific theory. There is both production of a local theory (i.e. empirically grounded in the field) and the analysis of data in such a way as to increase generality.

*Among other possibilities, the choice of a test country*

Yves Surel (2000) conducted a study on European central banks, to see to what extent national styles of public policy are affected by European integration and to assess if we can speak of a homogenization of practices and policies, or if significant national specificities remain. To this end, he chose to compare three countries, characterized by a statue providing little protection for the independence of this institution (contrary to the prescriptions of the Treaty), but which set themselves apart by their membership, or lack thereof, in the euro zone (central banks in France and Italy which should conform to requirements in the Maastricht Treaty, and that in Great Britain). By the presence or lack thereof of an obligation to change the statute of central banks, the author tries to discern the particular effects of European integration and of a "trendy" idea, that is, to give more independence to monetary institutions. Furthermore, a limited comparison is made with Germany, given that the *Bundesbank* is an explicit reference of the reforms. The choice of a test country can enable us to distinguish between economic and structural factors.

### *The question of number*

The question remains as to the number of cases to compare. Any comparison implies the comparison of at least two units. As a result, research on a single country; even if it is foreign, does not constitute a comparison – except if, in a systematic way, parallels are drawn with other cases (as Tocqueville did in *On Democracy in America*). For all that, even if a researcher does not wish to conduct

comparative research (for lack of time, for example), he can possibly compare his results with those of other studies conducted in different countries or sectors. It is rare for a researcher to be able to work alone on more than three or four countries, where there is significant field work. Beyond that number, we often see research collectives (for example, in the framework of European programs), or long-term research (over an entire career) or, of course, statistical studies.

Generally speaking, increasing the number of cases allows us to strengthen the representivity of research, all the while increasing the level of generalization, but as a result reduces the specificity of the statement. The result is that the specialist in comparisons should decide between specificity and generality, both with respect to delimiting the subject, development of concepts, and the choice of the number of cases. Potentially, the more the research subject is limited, the greater the number of concepts mobilized and intervening variables also restricted, the more detailed the comparison can be and the more conducted in a controlled way (Dogan and Pélassy 1982); but it often remains very indexed on the cases. The greater the number of cases, the more global and general the analysis can become. The borderline case is that of exhaustivity.

M. Dogan and D. Pélassy (1982) then propose a typology of modalities of comparison based on the number of countries and their degree of proximity. The authors point out four possibilities, according to the research is based on a "type-case" (deviant case or borderline case compared to a model notably), a binary comparison, and comparison between analogous countries (or systems) or on the contrary the comparison between contrasted countries (or systems). Certain common objectives can be pursued in all of these situations: to posit hypotheses and establish laws (in the sense of finding social and political regularities, and explanatory factors). Nevertheless, the choice concerning the number of cases and the comparative system have consequences both on the method of analysis, conceptual instruments (number, degree of specificity) and the degree of abstraction of the conclusions which are drawn (See Table 3).

## The Choice of Mode of Comparison

### *The comparison scale*

The choice of comparison scale depends not only on the scope or region of the research subject, but also the way in which it is studied.[14]

It would seem necessary to find the proper observation distance. Simmel (1981 [1917]), with the concept of "variable distance," underlines the fact that, depending on the distance chosen by the observer, he or she will understand the same object of observation in different ways: "When we see a spatial object at two, five, ten meters, each time we have another image, which is only accurate each time in each particular case and which can give rise to errors within these

limits. If, for example, we consider a painting from a few meters away, whereas we have previously looked at the detail in one particular part, the new vision will be totally deformed and distorted, although based on superficial concepts, we can state that the detailed view is more true than the painting seen from afar." The viewpoint of the researcher differs according to the level of analysis where he is located. He does not perceive reality in the same way, depending on whether he observes with the naked eye, with glasses, with binoculars or a microscope. The researcher, in choosing the comparison scale, the proximity or the distance, is led to take a concrete stance in the debate over the link between the micro, meso and macro levels.

This idea that the level of analysis chosen does not only influence the degree of specificity in the study of historical and social facts, but what we observe is at the heart of reflections on the work of micro-history.[15] First main hypothesis: when the researcher modifies the scale at which he positions himself to analyze the social, it is not only the focus of observation which changes, but the very nature of what he is observing: "the choice of a particular scale of observation produces effects of knowledge […] Varying the zoom lense of the objective, is not only to increase (or decrease) the size of the object in the viewfinder, it is to modify its form and framework […] Playing with the scales of representation in cartography does not mean representing a constant reality in larger or smaller size, but to transform the content of the representation (i.e. the choice of what is representable)" (Revel JXE:19).[16]

Secondly, "the principle of the variation of the scale [is] an exceptionally fruitful resource because it makes possible the construction of complex subjects and taking into the account the shatterproof structure of the social" (Revel JXE:13).[17] This other "cartography of the social" allows us to render an account of the complexity of the social facts, in order to "better understand the entanglement of social systems, also better resisting the temptation of reification of actions and relationships as well as categories which allow us to think about them" (Revel JXE:13). Social practices are put in perspective and replaced in particular social configurations in which they take a place: it is possible to understand the multiplicity of spaces and times, as well as the web of relations in which the fate of a man or a group of men is registered.

**Table 3 – Four strategies according to number of cases and system adopted**

| | Case Study | Binary Analysis | Analogous countries | Contrasted Countries |
|---|---|---|---|---|
| **Definition and examples** | Monograph, particularly deviant and borderline cases. | Comparisonof two units. | Similar countries which differ with respect to phenomenon studied. | 1. countries presenting a maximum amount of contrasts and<br>2. relevant contrasts (by the choice of exemplary countries). |
| **Objectives** | | 1. Put forward hypotheses.<br>2. Establish laws. | | |
| **When to use it?** | 1. To test a hypothesis.<br>2. Specify a problem. | 1. Refine knowledge of certain processes.<br>2. Stress specificities of cases.<br>3. Thus set an intermediate level of generalization. | To neutralize certain differences to better analyze others. | Ignore systematic differences in explanation. |
| **Limits** | 1. No longer really a comparison.<br>2. Difficult to establish causal relationships from monographs. | Difficulty in distinguishing what is due to context, to phenomenon studied compared to what is general. | | 1. Often extreme case study.<br>2. Risk of exaggerating differences. |

Source: Vigour (2005:186; table developed from the book by M. Dogan and D. Pélassy 1982, fourth part).

### *Case and variable analyses*

The specialist in comparison chooses between two approaches often compared: one which is first directed toward variables, and the other which concentrates on the thorough analysis of certain cases.

In the case approach, the comparison is based on meticulous examination and the comparison of several cases. The phenomenon is studied in its globality and diversity, using a historical perspective. The analysis stresses the complexity of relations of causality, as well as the national or historical anchoring of conceptual categories. Monika Steffen (2000) studies the transformations of health policies, following the AIDS epidemic in several European countries: Germany, France, Great Britain and Italy. For each country (even if she then represents the results in a comparative way), she draws up a chronology of these changes and explains the factors which have facilitated or slowed them. She considers both the epidemiological dimension – a historical and sociological perspective – particularly the relations between the government, doctors and prevention associations. Most comparative research really based on qualitative methods corresponds to this approach.

On the contrary, the variable approach is not related to cases per se, but it breaks them down into variables: the researcher identifies parameters which seem relevant to him given the issue he is studying; he then notes the presence or absence of each of them and their relative importance. Thus, to measure the degree of independence of central banks and scope of changes that they underwent during the decade of the 1990s, Yves Surel (2000) defines four principle variables (statute of the executive organ of the central bank, policy formulation, assigned objectives, limitations on loans to the government), themselves broken down into several indicators (for the first variable, the duration of the term, modalities of nomination of the executive, modalities of resignation, possibilities of holding several posts concurrently within the government ). Each one of the variables being noted on a (maximum of independence) and the affected indicators of a value, Y. Surel, according to the modalities of operation of each bank registered, attributes to each parameter a value all the stronger as independence is better guaranteed; he can then compare the banks over time and between countries, based on the calculation of the degree of independence of each central bank on a given date. He shows that France has gone from a weak index to a high figure, slightly higher than that of the *Bundesbank* before the Maastricht Treaty; Italy has also seen a similar evolution but to a lesser degree. The author sees here the strengthening of a European institutional path which also influences even countries outside of the euro zone (in this case, Great Britain) through an effect of dissemination. The objective is to generalize, to test a theory all the while attempting to statistically control the parameters and possibly identifying deviant cases.[18]

With respect to method, the case approach – contextualized and often in part historical – grants great significance to configurations; it stresses the complexity of the causal relations discerned. On the contrary, variables analysis (often considered out of context) is often based on a statistical approach which depends on quantitative methods. In the first case, the sources mobilized are varied (written or oral) – whether it be interviews, archives, observation. In the second case, numerical indicators come from the mobilization of research and quantitative methods (even if it happens, as in the example mentioned above, that they were constituted from qualitative sources). Whereas the case analysis depends instead on a small number of units, the field of variable analysis tends to be broader. In a symmetrical way, the degree of abstraction is more reduced in the first approach than in the second; complexity and particularity are developed in the first approach, whereas variable analysis allows us to achieve a greater degree of generality and to obtain more synthetic results. The respective limits of each one of these approaches follows from this: on the one hand, the slightest ability to increase in generality and categories sometimes hardly transposables because of their contextualization; on the other hand, the absence of contextualization, the test of abstract hypotheses and *a priori*, without taking into account interrogations with respect to the reliability of data (to learn more, see the special issue of *Enquête*, 2001; Ragin 1989).

**Conclusion**

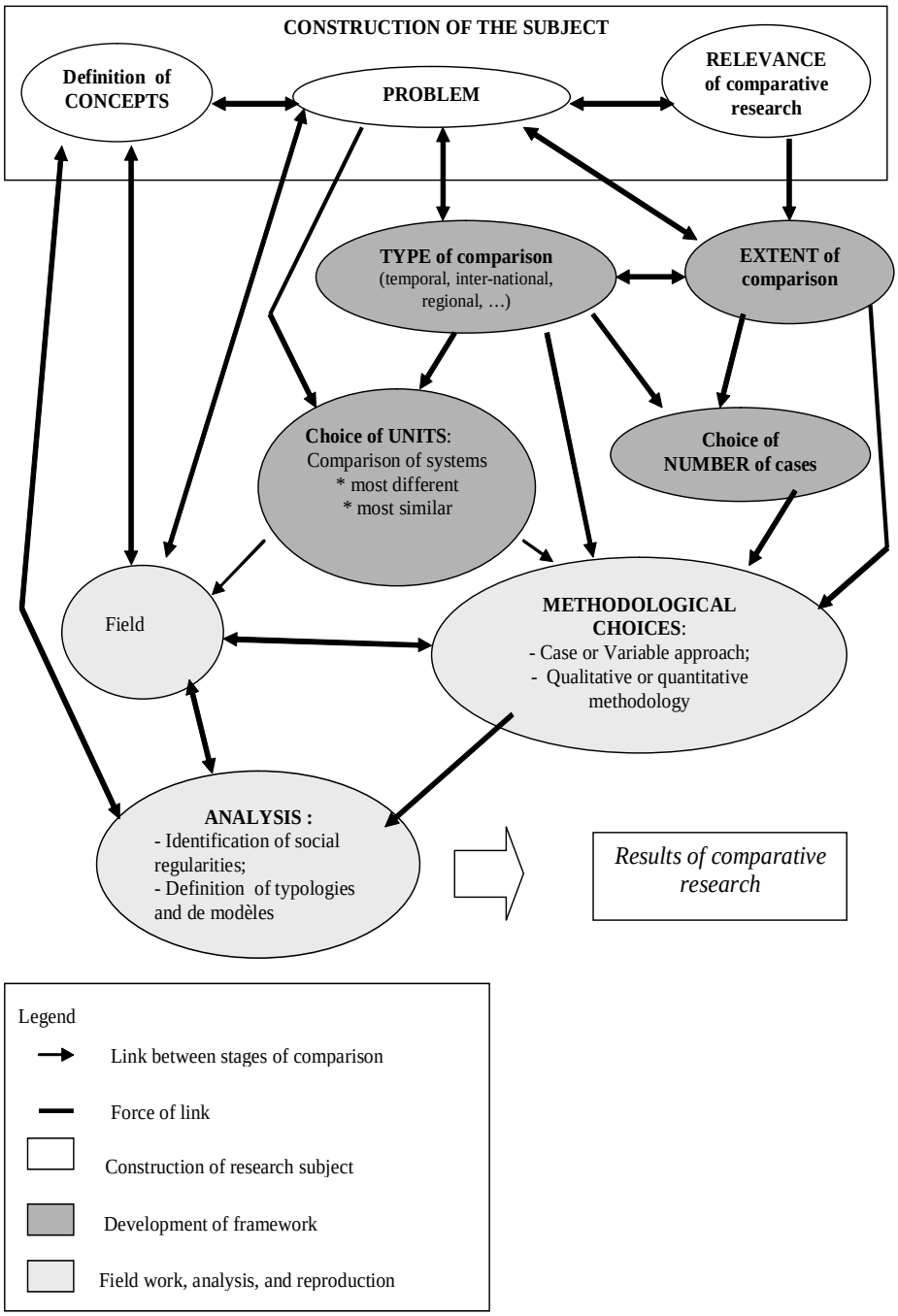
Here, in the guise of a synthesis are the main stages of a comparative approach, recapitulated in the following diagram and grouped into three important periods: construction of the subject, development of the comparative framework, and finally, field work and analysis. In practice, of course, several of them are overlapped, but here we have broken them down for greater clarity. Thus, the development of the framework for comparison is accomplished progressively, and in part, parallel to field work, following a come-and-go dynamic between the research phase, reading, and the work of formulation of hypotheses and development of a theory.

**Table 4 – Ideal type distinction between case and variable analyses**

| Type of research | Case analysis | Variable analysis |
|---|---|---|
| Method | Historical, contextualized analysis, rather qualitative. Analyze configurations, stress on complexity of factors and causal relations. | Statistical approach, rather quantitative.. Analysis based on variables (considered outside their context). |
| Materials | Varied (interviews, archives or other written sources, observation). | Numerical statistics or indicators (possibly established from qualitative sources). |
| Number of cases | Often few | Large |
| Level of abstraction | Often more reduced. | High |
| Level of generality | Complexity, singularity. | Greater level of generality. |
| Limits | 1. Less ability to increase in generality.<br>2. categories often hardly transposables, because they are too rooted in the fields. | 1. Absence of contextualization.<br>2. Often test abstract hypotheses.<br>3. Reliability of data. |
| Research objectives | 1. Formulate *hypotheses*. | 1. Put forward *hypotheses* on large samples. |
| | 2. *Test* the relevance of certain theories (study counter-examples, deviant cases). | 2. *Confirm* theories (test of soundness). Increase in generality easier.More synthetic results. |
| | 3. *Detail* a theory. | |

**Sources:** Vigour ( 2005: 205; Table developmeent from M. Dogan and D. Pélassy 1982 et C. Ragin 1987)

**Schema 1 - Comparison in social sciences: the principal stages of work of the specialist in comparison**



As we have seen, comparison is a stimulating research strategy for two main reasons. On the one hand, in confronting the researcher with the difference in near-by countries or on the contrary with similarities in countries if contrasted, comparison invites him to free himself from what seemed to him to be a given and broaden his field of observation and analysis. On the other hand, the work of understanding and explanation which is made more complex (by the relationship between distinctive details and explanatory factors) gains simultaneously in soundness because of its validation in several domains: depending on the number of cases studied, comparison enables us to advance hypotheses or to construct a model of analysis.

At the same time, to become involved in a comparative enterprise is not without dangers which are so many "downsides." The main pitfall is with no doubt in the ethnocentric bias – namely, the fact of pinning a problem on other places, a model of analysis or a research protocol developed in a field. Another difficulty, and not the least, can be termed a "technicist bias": the pratical orientation of the comparison, which is ancient but which today is seeing a considerable boom through research on best practices (benchmarking, precondition for all new legislation, for example), runs the risk of distorting the understanding of the phenomenon studied, by the instrumental design which is adopted, on the one hand in leading the researcher to be interested in what should be, before observing what is, by encouraging him to stick to term-for-term comparisons (or terminological), without taking the exact context into which this social fact is inserted into consideration. This is the reason why the specialist in comparison should try to successfully distinguish systems of expertise from those of knowledge, and to identify the social and political issues inherent in the theme of his study the better to keep them at a distance.

Thus, we can explain the necessity of reflexivity for the specialist in comparison, understood as a distanced return back to his research practice. Some difficulties of the comparative approach indeed require a particular vigilance on the part of the researcher, facilitated by certain tools, like the rigorous definition of the research subject, central concepts and the problem; the ability to stand back (in relation to his preconceptions) without losing his abilities for empathy, the choice of cases to compare, etc. But that should not make us forget the importance of tinkering in concrete implementation of comparative research. These tools will not replace the experience acquired with practice. Depending on the characteristic of each field, the researcher is led to cope with the particular difficulties, because research always includes unforeseen situations which involve "tinkering" solutions.

## Notes

1. Even if the comparative approach has been unequally mobilized depending on the disciplines and the time periods (Vigour 2005).
2. We will stress here international comparisons – certain methodological pitfalls being more pronounced in this case.
3. Certainly, if we define a method as a "set of approaches followed by the mind to discover and show the truth" or a "set of reasoned approaches, followed to arrive at an objective" (cf. the dictionary *Petit Robert* 1998), then comparison is indeed a method.
4. According to G. Jucquois and C. Vielle (2000), comparison is at once a methodology (by the mobilization of numerous methods), an epistemology (as means of knowledge for the comparison to the Other) and an ethic (faced with the risk of relativism).
5. Running the risk of placing fairly different cases in a same category. For a review of criticism directed at typologies, see Vigour (2005:287-291).
6. Other works are explicitly designed to answer a controversial question in the public space. This is the case of the work of C. Baudelot and R. Establet (1989), *The Level Is Increasing*, which was designed to show, with figures to back it up, that the French discourse on "the decrease in academic level" was erroneous (the average level was said to increase, even if the disparities were simultaneously sharply increased). The work is situated at the intersection of the research forum and the social forum.
7. Cf. also Delpeuch (2006); Dezalay and Garth (2002 and 2008). For analyses related both to the comparative approach and mechanisms of exchange and transfers, cf. Werner and Zimmermann (2003); Hassenteufel (2005) and Vigour (2008). For M. Werner and B. Zimmermann who call their approach crossed history, the reflection on intersections (pratical and intellectuals) deals at the same time with subjects, viewpoint, (empirical and epistemological constitution of the subject), scales of observation and relationships between observer and subject (particularly the need to monitor the effects of asymmetry of relations between the research and his various fields or sources). (Inter) active and dynamic principle of intersections (unlike studies in terms of transfers), consequences and process-related dimension of these latter are dimensions essential to research. This research trend is one of those which has thought the most systematically about the theoretical, methodological and epistemological implications of an analysis of intersections. Developed starting in the mid-1990s, this multidisciplinary approach, the unity of which is based on the desire for historicization, aims to theorize, in proceeding by pragmatic and reflexive induction (cf. also Zimmermann, Didry and Wagner 1999).
8. Cf. the study on photographic practices in 1963 for Kodak by P. Bourdieu, L. Boltanski, R. Castel and J-C.Chamboredon. They drew from it *An Average Art*, where they highlight very distinct social uses of photography. From a commercial order, probably designed to better target the clientele, this team succeeded in making a sociological analysis.
9. Cf. M. Lamont and L. Thévenot (2000), who formed bi-national partners for the realization of research in such a way as to always introduce distance and a more "staggered" foreign regard.

10. Otherwise the risk is great to establish cats-dogs, i.e. non-relevant categories of analysis (Sartori: 1994). On the contrary, historicizing and making reflexivity prevail are means of questioning the seeming naturalness of all categories, and of articulating diachronic and synchronic dimensions (Werner and Zimmermann 2003).
11. This concept allows us to "link universals to particulars, to organize our categories on a scale of abstraction, whose basic rule of transformation (aggregation going up, specification coming down) is that the connotation (intention) and the denotation (extension) of concepts are inversely correlated. Thus, to make a concept more general, i.e. increase its capacity for mobility, we should reduce its characteristics or properties. On the other hand, to make a concept more specific (suitable with respect to the context), one should increase its properties or its characteristics" (Sartori 1994:32)
12. For example, we access the increase in salary associated with an extra year of studies, without considering the fact that salary varies over the career, depending on professional experience.
13. G. Peters (1998:51) speaks of a "selection bias." Thus French researchers most often include France in their comparison.
14. For a synthesis of reflections on the game of scale conducted in social sciences, see Vigour (2009).
15. For a synthetic presentation, cf. Revel (1996) [hereafter designated by the abbreviation JXE].
16. As Pascal stresses, "a city, a countryside, at a distance, is a city and a countryside, but as we get closer, they are houses, trees, tiles, leaves, grass, ants, ants' legs, *ad infinitum*" (Pascal, Blaise, 1963, *Pensées*, n°65-115, in *Œuvres completes/Complete Works*, Lafuma, Paris, Seuil, p. 508 – cited by Bernard Lepetit, "De l'échelle dans histoire/On scale in history", in JXE*,* p. 94).
17. The question of whether the main point in research is to make the scales vary, or even adopt a micro sort of approach remains controversial among researchers whose work refers to micro-analysis. For J. Revel, "no scale is privileged over another, since it is their comparison which procures the strongest analytical benefit." For others (like M. Gribaudi), "in the production of forms and social relations, the "micro" engenders the "macro"; the result then is "an absolute privilege of the first". Cf. the study on photographic practices conducted in 1963 for Kodak by P. Bourdieu, L. Boltanski, R. Castel and J-C.Chamboredon. They drew from it *An Average Art*, where they highlight very distinct social uses of photography. From a commercial order, probably designed to better target the clientele, this team succeeded in making a sociological analysis.
18. There are intermediate cases, like the longitudinal cases, dealing with a large number of countries. It is also possible to associate the two approaches (cf. Boolean analysis developed by Ragin 1987).

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