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RESEARCH ARTICLE

THE LOGICAL STRUCTURES OF COMPARISON
Its forms, styles, problems, and the role of history in social and political research

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ABSTRACT: All political sciences share the same logic and methods as the empirical social sciences and therefore produce perceptive knowledge. Empirical knowledge is based on a specific kind of observation driven by a set of theoretically developed concepts related to clearly observable social phenomena. Not all the concepts, however, are readily amenable to observational terms. We usually need to proceed to their operationalization. The formulation and the operational definition of the empirical concepts does not exhaust the analytic process. It is also necessary to observe how the phenomenon occurs in the reality, proceeding to classification or typological constructions and, sometimes, to the production of multidimensional models. Only after this process will the formulation of hypotheses be possible. They will later be verified through the use of methods of empirical control. The most frequently used activity in political sociology is comparison, which is the main method of any social science according to most scholars. Comparison can be carried out both among a certain number of cases or within a single case by comparing it in its historical development. The temporal dimension becomes crucial when one wishes to produce historically rooted generalizations and theories, therefore confined to a spatial and temporal dimension. Before proceeding with the comparison we must make sure that the cases selected are actually comparable and that they possess at least one property in common. The objective of this paper is therefore to describe forms and styles of comparison within the logic of social and political sciences.

KEYWORDS: Comparison; Research logic; Social and Political Research; Empirical Concepts; Historical Sociology

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1. The research logic in the social sciences

The need for specialization has meant that several approaches to the study of politics have been developed. In all cases they all share the logic and methods of the empirical social sciences. The term "empirical" is derived from the Greek ἐμπειρία (*empeiria*), composed of ἐν, ἦν (in, inside) and πεῖρα (test), which suggests that knowledge is based on the observation and the sensory experience of the subject within a reality encountered in its entirety. All the modern sciences are based on this assumption, departing from the speculative tradition of philosophy. Also political sociology, like the other social sciences, has historically refined its instruments of research and analysis, distancing itself from political philosophy. Scientific explanations must always be verified and, for this reason, the primary task of the social sciences is to describe phenomena under investigation, that is, to understand them in terms of observation. If the problem of the philosophers is to answer the *Why*-question (ie why the world, the universe, the violence, the dictatorship and the democracy), social scientists limit themselves to seek answers to the equally important *How*-question (ie how the real world is made and works). Empirical knowledge is therefore always adherent to the facts and produces a form of "perceptive" knowledge, based on sensory perception.

This is not to say that empirical knowledge is concrete because it is immersed in actual fact, while non-empirical knowledge is abstract. Any form of knowledge needs in fact to rely on concepts that lie at certain levels of abstraction, but in the case of social sciences, this abstraction should always be traced back to observational terms. It is a problem that philosophers or theologians do not raise, because their form of knowledge is not necessarily satisfied by a descriptive response. Philosophical knowledge transcends «the empirical» and uses speculative language (Sartori 1980, 32). Its knowledge is not perceived but conceived and its object is not the *mundus sensibilis* but the *mundus intelligibilis*. Of course, the aspiration of every science is always nomothetic, from the greek νόμον τίθημι (*nomon títhemi*), that is aimed at the production of laws (which in the social sciences, as we shall see, is a controversial matter). This means that, after describing *how*, social scientists must still hazard one or more explanations about *why*. Let's say that, unlike what happens in philosophy, in sociology *why* is always preceded by the analysis of *how*, the description is therefore placed before the explanation.

Before coming to the description of a phenomenon and, possibly, to its explanation, every social researcher should formulate a research question according to five criteria: 1) attention to the problem; 2) relevance of the topic; 3) knowledge of the literature,

i.e. the state of the art; 4) precise formulation; 5) empirical controllability of the formulation itself:

A) «Attention to the problem»: the first criterion is derived from the subjective interests of the researcher. When we choose to study a socio-political phenomenon we do it on the basis of our willingness to deal with one specific issue rather than another. Each scholar receives some inputs from the external environment and responds to them, forming an idea about the world around him. For example, by reading newspapers, or simply by living in a social situation, each individual develops a certain curiosity thanks to which he directs his attention in one direction rather than another. It is the sensitivity of the researcher and his system of values that guides him to a specific issue. This does not mean that it is then the value system that embodies the whole path; here we come to the theme of the Weberian value-freedom of science. Every sociologist should try to remain impartial when conducting research, otherwise they risk producing ideological (and therefore mystifying) knowledge, preventing the advancement of social knowledge. It is clear that no researcher can be completely neutral, because neutrality is almost impossible and even not desirable, but it is also true that every social scientist can use a analysis and techniques that enable him to limit the influence of his own prejudices.
B) «Relevance of the topic»: the second criterion that a scholar should follow in the formulation of a research question is the relevance of the object to be investigated. Social sciences claim to have a certain utility, so sociological and political analysis should at least aspire to solve socio-political problems, focusing on phenomena and processes characterized by a certain social significance.
C) «State of the art»: when scholars are going to formulate a research question, it is presumed they intend to produce an advance in knowledge. This presupposes an awareness of the state of the art, i.e. the studies already performed and published on a particular topic. This allows each researcher to critically rethink their preconceived ideas and the possible hypotheses to be formulated.
D) «Precise formulation»: the precise formulation of an empirical question presupposes a clear definition of the context, that is, the space and time frame within which phenomena under investigation occur or have occurred. At the same time, a precise empirical conceptualization of the object is required. On the conceptual definetion of the problem depends a good part of the research path. Every empirical concept must therefore be able to be «operationalized», that is attributed to observable phenomena, hence the need to resort to forms of «classification» or «typolo-

gies» and, subsequently, to the construction of «hypotheses» that should be subject to «empirical control».

E) «Empirical control»: the issue of empirical control is highly relevant because it is closely linked to the choice of the best method for testing the assumptions made. No scientific explanation is possible without this step which presupposes the choice of one of the available methods of control of the empirical reality. As we shall see later, in political sociology the most useful method is "comparison" implemented in one of its several forms and carried out through a variety of techniques.

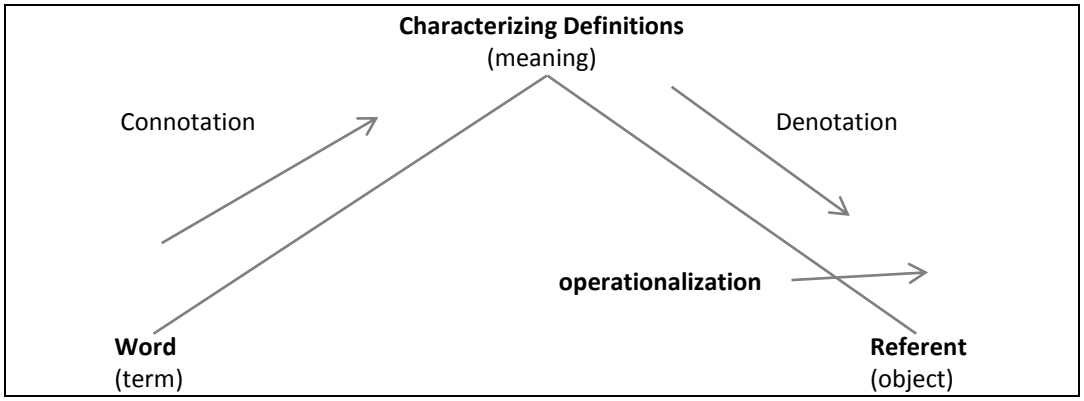
2. Definition and operationalization of empirical concepts

We have mentioned above that the definition of the empirical concepts to be operationalized is a fundamental criterion. When we speak about the formation of concepts, we also mean their subsequent treatment and systematization. In the words of Sartori (1984), a concept can be understood as «unity of thought» just as words are «units of language». Each concept is expressed by a term (a word) whose meaning is stated by means of a specific definition and related to specific referents (i.e. attributable to observable things). The case of maximum observability of an empirical concept is realized when it is immediately susceptible to operationalization, hence when it is possible to specify the operations required for its measurement, a case that rarely occurs in the social sciences.

2.1. The Construction of empirical concepts

The procedures for the construction of an empirical concept are illustrated in Figure 1. Firstly, it is necessary to establish the relationship between a «word», which names the concept, and a «meaning», that is its «characterizing definitions» (left side of Fig. 1). What needs to be identified is therefore its «connotation» or «intension»,i.e. the set of «properties» that the researcher attributes to it. A concept is called «ambiguous» when it is poorly connoted. The easiest way to connote a concept is to use «declarative definitions» commonly found by consulting a dictionary or by using the etymology of the term. Secondly, a concept should be defined by assigning one or more empirical referents to it (right side of Fig. 1). What needs to be identified is therefore its «denotation» or «extension»,i.e. the class of (observable) objects applied to it. A concept is called «vague» when it is badly denoted.

Figure 1 – Formations of the empirical concepts



The relationship between connotation and denotation, within a hypothetical scale of abstraction, is inversely proportional. The smaller the features that the researcher attaches to a concept (ie the more ambiguous a concept is), the greater the number of objects to which it may be applied. Conversely, the more a concept is connoted, the fewer the objects to which it may be applied. Let's take the example of research on student movements. We firstly have to define a social movement: we can define it as «a network of informal relationships among individuals who share the same beliefs». At this point, there are more or less three elements of the connotation: «relational informality», «encounter between individuals», «sharing of beliefs». These undoubtedly fall into the characterization of a social movement, but also of a group of friends, two very different cases.

To reduce the vagueness of the concept, it needs to be less ambiguous, therefore more defining elements must be added to the connotation. We could then say that a social movement is «a network of informal relationships between individuals and groups who share the same beliefs, are linked by mutual trust and solidarity and act collectively». Compared to the previous definition four other connotative elements have been added: «presence of groups» (not just individuals), «trust», «solidarity» and «collective action». At this point, the number of objects to which the concept can be applied decreases, but this definition is still too vague, because it may include a social movement as well as a religious sect, or even the supporters of a football team. The connotation should be further enriched by adding some more elements, such as for example «conflict» and «protest». We can then provide a fairly comprehensive definition: a social movement can therefore be defined as a «network of informal relationships between individuals and groups who share the same beliefs, are linked by mutual

trust and solidarity and act collectively in a conflictual way through a frequent recourse to protest». Now the concept is not ambiguous and its referents are determined. What is now left to identify is only the issue of the contentious behavior (school, university, work, environment, etc.) in order to discriminate the type of social movement we are referring (student, worker, environmentalist, etc.). The main effort is therefore to separate the "defining" (ie necessary) from the "contingent" characteristics.

2.2. The operationalization of empirical concepts

Some empirical concepts are placed on a high level of abstraction and, for this reason, they do not have immediately observable referents. They should therefore be traced back to concrete, visible and measurable elements. This procedure, which is placed in the path between «meaning» and «empirical referents» (see the right side of fig. 1) is called «operationalization» and indicates the necessary steps whereby the researcher gives empirical content to not immediately observable concepts (Bruschi 1999, 72-77; Cannavò 1984). Let's think of concepts such as «democracy», «political system», «government», «authority»: they are all expressions of everyday use, yet they are so abstract that they need to be handled using «empirical indicators» and «operational definitions». Indicators express a bond of semantic representation between a more general concept and a more specific one through which an operational definition can be provided. For example, if we want to investigate the «level of democracy», we can find a significant property in political participation. It is necessary, however, to identify an empirical indicator that allows us to analyze participation. To be able to measure this concept it is necessary to resort to simpler concepts that are related to the more general one of «participation» through a link of indication. For example, the percentage of people who vote. The indicator is expressed as a variable (in this case the vote) detectable through qualitative categorizations or through numerical measures. In the latter case, we can also develop «indexes» able to numerically synthesize the information collected on the basis of certain indicators. Back to our example, if we admit that an indicator of competition related to participation is given by the volatility of the vote (i.e. the change of voting orientation from one election to another), it would be possible to statistically combine data from different elections in different countries in order to produce an index of democracy. This index would suggest that «greater competition» and «high electoral participation» also mean «high democracy». In general, the use of more than one indicator is essential to the empirical analysis of a given phenomenon.

To summarize the steps of the analytical process, following Lazarsfeld (1969 vol.1, 41 ff.), we can say that: 1) the analysis begins from the «definition of an empirical concept», which is the phenomenon we want to investigate; 2) the concept has to be divided into dimensions or properties; 3) it is then necessary to identify the largest number of indicators deemed relevant; 4) when it is possible (as in quantitative research) it could also be useful to formulate indexes.

3. Classification and methods of empirical control

Conceptual formulation and operationalization does not exhaust the analytic process. An overview of the phenomenon must be implemented by observing how it occurs in reality. Through the connotation we can create an initial distinction of the concept from other related ones. A next step is the division of phenomena into «classes» or «types».

Classification process is the intellectual operation through which the denotation of a concept is divided into classes (Marradi 1987, 44). In this regard, it is useful to identify a criterion of discrimination and differentiation between multiple realities, then attribute them to the single classes. This process is very rigid. For this reason, sociologists and political scientists often build typologies (i.e. multidimensional classifications). The process of typology construction is a form of reconnaissance of already defined realities according to one or more differentiation criteria. The analysis of the party systems can provide a useful example for the definition of a typology. Based on the number of parties and their location on the political spectrum, it is in fact possible to produce typologies of one-party, two-party, and multi-party systems, in turn separable into subtypes through the identification of additional criteria.

Both classification and typology have some problems: first, classes and types must arise at the same level of abstraction, otherwise we risk ruining the analysis. We cannot compare multi-party systems, one-party systems, and polarized pluralism systems, because the latter is rather a subtype of a multi-party system. Second, both typologies and classifications have the limitation of producing an oversimplification of reality, acting as a filter with respect to complex and multidimensional phenomena.

One way to avoid the excessive loss of information implied in the classificatory logic may be to develop multidimensional models that take us back to the concept of «ideal type» theorized by Max Weber who, as everyone knows, defined it as a selection of decisive elements of a complex historical situation, handled in a simplified framework. By extracting some elements from historical situations, the researcher makes them an-

alytically comparable. In short, an ideal type concept is a sort of prototype and it can be built by a work of abstraction and combination of a number of elements, all present in reality but only rarely, if ever, in that specific form. The notion of «ideal type» is very close to that of «model» in which the various aspects of a phenomenon are traced in a unified framework without necessarily producing a classifications or typologies. For example, we can consider the different party models (notables, vanguard, mass, cartel, etc.) identified, as we shall see, on the basis of certain characteristics (dimensions) that facilitate analysis and comparability.

All of these operations - from the operationalization to the elaboration of classes, typologies or models - require a collection of information and data that can occur in several ways, either by drawing on secondary data (ie already collected by others), or retrieving them directly (analysis of documents, interviews, questionnaires, direct observations, etc.). This allows us to formulate hypotheses about the relationship between variables. Having to analyze a phenomenon and its functioning may in fact be useful to identify, within a specific context, the relationship between the independent, dependent and intervening variables. The «dependent variable» is the phenomenon we want to explain, the «independent variable» is the one we assume (hypothesize) may be the cause of the phenomenon itself, the «intervening variable» is a third kind of variable that influences causal dynamics and helps us to explain the phenomenon (the dependent variable) better.

3.1. The methods of empirical control

The assumptions on possible correlations between variables need to be empirically controlled. Here we enter the domain of methodology, one of the main tasks is empirical control. We can identify four main control methods: «Experimental method», «statistical method», «comparative method», and «case study».

A) «Experimental method»: although widely used in the exact sciences and in psychology, it is difficult to adapt to political sociology, because it presupposes the formation (selection) of two groups of individuals chosen according to the objectives of the research and distinguished according to certain criteria. One of the two groups (the experimental group) is subjected to some stimuli in order to consider the reaction of its members, while the other group (the control group) is not exposed to stimuli. Comparison between the two groups enables the actual impact of the stimulus on the behavior of the members to be evaluated. In other words, it

is possible to isolate the independent variable and assess its impact on dependent variables. It is without doubt the safest method when the aim is to identify causal relationships. But, as mentioned, it is usually difficult to implement this method in political sociology. Political analysis often focuses on macro-processes (revolution, modernization, democratization, etc.) that are not susceptible to experimental analysis.

B) «Statistical method»: it also allows variables to be isolated, but cannot be used in all research: first, it assumes that the researcher has numerical data to be statistically treated; second, it assumes a high number of cases. Statistically, it is possible to isolate variables assumed to be relevant. For example, if we intend to analyze the impact of the «educational qualification» on the level of «political activism» of a population of young people, we can do it by turning into «parameters» (i.e. keeping them constant) other possible intervening variables such as the «sex» or the «political orientation of the parents». We need a sufficiently representative sample of individuals of the whole universe to produce analysis with a certain relevance. But several scholars express serious concerns about the quantification of qualitative data. To measure (ie to quantify) the ideological distance between political actors is very difficult, the risk is always to introduce elements of arbitrariness due to the choices of the researcher who attaches a cardinal value to the cases.

C) «Comparative method»: even if it does not guarantee the same reliability as the experimental and statistical methods, it is the most important method in the social sciences. Actually it would not even be correct to define it as a method, because comparison is a cognitive activity present in both experimental and statistical action. It is the activity of comparing two or more *states*, of two or more *properties*, of two or more *objects* in a specific historical moment or even in a broader period of time. It is the most widely used mode to produce empirical propositions without much straining and manipulations of reality. We will devote the next section to comparison.

D) «Case study»: it is a particular strategy of comparison that many scholars connect to the historical method. It may be understood as a method whereby a single case is thoroughly examined, for example by comparison of the properties within multiple points of time. In this way it is possible to analyze the specificity of a nation or a people. This can already be useful to outline some explanations of a specific phenomenon. According to Lijphart (1971; 1975), case studies can be classified as follows: «a-theoretical studies», mainly useful to gather information and produce descriptions as lacking a theoretical framework; «interpretive studies» that refer to generalizations and theories, trying to verify them in an attempt to provide an

interpretation of the particular case; «hypothesis-generating studies», which are very useful to develop hypotheses and theories to be tested on cases in which the research is still at a pioneering level. There are also case studies aimed at controlling or falsifying a theory.

3.2. Generalizations in social sciences

The empirical control of hypotheses is used to provide explanations and, possibly, new generalizations and theories. In political research, generalizations -i.e. statements applicable to multiple objects - are necessarily «limited». The unpredictability of social phenomena precludes in fact the establishment of absolutely valid rules. Every explanation and every theory, to quote Tilly (1981), must be historically and geographically contextualized. Yet some form of generalization should be produced. So it is necessary for socio-political research, following an analytic path consistent with the parameters described above, to be capable of producing statements that describe properties and express relations on the basis of a set of information and data spatially and historically defined.

Even theories – in the sense of a set of propositions with a certain explanatory content - will always be «local theories» (Boudon 1984), related to data with precise temporal and spatial boundaries. There have been scholars who in the past made nomothetic claims, imagining that the social sciences could produce laws such as those developed in the natural sciences. We refer to the classical debate on method and to the opposition between nomothetic sciences, the meaning of which is already known, and idiographic sciences, from the greek ιδιος-γραφιχος (idios and graphikós), with the meaning of «describing the particular» thus denying the opportunity to express ever valid generalizations.

The idiographic approach is therefore in opposition to the nomothetic assumption of a sort of methodological (and epistemological) continuity between the physical and social sciences. The distinction between the two approaches can be traced back to the German philosopher Windelband who, in the so-called «debate on method» (*Methodenstreit*), at a conference held in 1894, reported the controversy between neo-positivists, supporters of a nomothetic approach on the model of the physical sciences, and those, in particular Dilthey, who thought in the opposite way. In his *Introduction to the human sciences*, Dilthey (1991) argued that the social sciences could not be superimposed on the physical sciences because they are characterized by their own specific method – i.e. the *Verstehen* (understanding). While the natural sciences seek to explain

events by reducing them to a uniform system of laws, the humanities instead try to «understand» single events based on the «lived experience» (*Erlebnis*). Scholars such as Winch (1958), Habermas (1988) and Gadamer (1975) subsequently identified with this approach which can be traced back to a humanistic and hermeneutic tradition.

This approach is modeled on historiographical practice in which the description of particular facts and chronologies often sacrifices the ability to produce explanations or comparisons. According to Marradi (1987, 130) the choice of an idiographic approach does not exclude the possibility of comparing, and argues that assigning idiographic aims to comparison does not mean giving up the formulation of explanatory arguments or the adoption of statistical techniques. But let's come back to comparison that, in the scientific debate, has been often the scene of a confrontation between scholars that reflected the classic, and in some respects sterile, conflict between idiographic and nomothetic, as well as between supporters of quantitative and qualitative approaches. From this point of view, in recent years, the development of studies on the comparison in political and social sciences has led to the overcoming of certain dichotomies until the proposal for integrated approaches, such as the so-called "Ragin's revolution", from the name of Charles Ragin, founder of the innovative methodological school for the QCA (Qualitative Comparison Approach) through which attempting to bridge the different worlds of case-oriented researchers and quantitative cross-national researchers (Ragin 1987; Schneider and Wagermann 2012). Unfortunately we don't have the opportunity here to analyze in-depth these new approaches but rather we can offer to our readers just a brief introduction to comparison in the social sciences.

4. Comparison in the social sciences

Comparison is one of the activities that shapes human experience. In addition to comparisons of other individuals, human beings make continuous comparisons between objects and events they encounter during their life. In the history of human thought, Smelser noted (1976), the tendency of groups to distort the perception of the «other» has become more and more evident. Over the years, some scholars have developed strategies to overcome these distortions by establishing approaches that enable the differences in organization of collective life to be understood, regardless of the intellectual categories of the social groups.

These efforts have been defined in several ways - analysis between cultures, between nations, comparative studies - and have in common the need to describe and explain socio-cultural phenomena just as they are realized in different social units

(groups, societies, communities, etc.). As Emile Durkheim stated in his study on the social division of labor (Durkheim 1964), comparative sociology is not a particular branch of sociology; it is sociology itself that ceases to be merely descriptive and aspires to explain facts. To describe a specific situation presupposes a universe of situations which, to be explained, need to be compared. This awareness forces us to reflect on «comparative methodology» in a broad sense as a critical evaluation of research related to the regulatory standards of scientific inquiry.

Comparison in daily life is set up as a quick observation, while in science it is more complex. Obviously it depends on the context and objectives of comparison. Here we are interested on that specific form of comparison which is realized in the scientific field and, in particular, in the social sciences. It is therefore necessary to identify a criterion in order to primarily determine the degree of complexity of comparison. To begin with, we need to specify that, in order to define a comparative act, it is not necessary for two objects to be taken into account (for example France and Italy or, more simply, Carlo and Marco). As noted by Eckstein (1975, 85) and Bartolini (1991, 177), it is also possible to compare the *states* of the same *object* in two or more *points of time* (for example, the level of political stability in England in the **s**ixties and in the nineties, or the academic performances of Carlo in the first year of college and in the last).

«Objects», «states», «properties» and, possibly, «points of time» are therefore to be considered the logical elements of comparison. We now choose to follow the logical frame proposed by Marradi (1982). He first considers a classification that proceeds from the most simple to the most complex form of comparison. We talk about simple or elementary forms when we refer to comparison in terms of a cognitive propensity of human beings, as a tendency easily seen in ordinary existence. The most basic form of comparison - what Marradi calls the «logical atom» of comparative practice, is based on comparison of the «states» of two «objects» on a «property» and it can be exemplified in a phrase such as «the UK is more populous than Italy».

In this case, the UK and Italy are the two objects of comparison, the residents are their status on the property (i.e. populousness). In this case, comparison was based on an assessment of major/minor, but in the event that the property has no ordinal categories we could also have a simple judgment of same/different (i.e. «the UK is an Anglo-Saxon country, Italy is a Latin country»), or, in other cases, of presence/absence (i.e. «the UK is in the Commonwealth, Italy is not»). It therefore seems clear that we never compare two objects «globally» but always their states on one or more properties, otherwise there is the risk of making tautological judgments, such as «the UK is different from Italy» and it is certainly not necessary to make a hard cognitive effort to reach this conclusion.

Since we compare the «states» and not the «objects», in order to make a comparison there need not necessarily be two objects but it is necessary that there be two (or more) states on a property. In this case, we should add the temporal element, making judgments like «Italy today is more populous than thirty years ago». There is one object (Italy), but there are two states (residents) on the property (populousness). Although the latter form of comparison may seem simple, actually it introduces some complexity. If in fact the first model of comparison presupposes the existence of five elements of three different types (one property, two states, two objects), in the second model, while eliminating two elements (one object, namely the United Kingdom, and its state on the property, i.e. British citizens), it introduce four more: the time, which being neither an object nor a state nor a property is a fourth element; two different states of time (nowadays and thirty years ago) and two states (rather than one) of the same object (i.e. the different number of Italian residents at the two different time points).

Furthermore two states of the same object on the same property can also be differentiated by associating them with two different states of a different property. Let's think of the statement «Italy in the summer is more populous because of the tourists». This model of comparison assumes seven elements: one object (Italy), two properties (populousness and season) and two states on each of the two properties (greater/less populousness and presence/absence of tourists). In appearance this model seems simpler because, by eliminating the time variable, it always presupposes seven elements, but of just three types (object, state, property).

Actually this lower complexity is only apparent since the statement «Italy in the summer is more populous because of the tourists» presupposes an effort of induction based on some «observation protocols» such as: «In the summer of 2000 there were many tourists who crowded Italian cities». Each of these protocols consists in turn of seven elements: one object (Italy), the time and its state (i.e. the year or the day on which the protocol is reported), two properties (populousness and season) and the respective states.

Of course, the inductive process cannot settle for just one case, but it should collect a series of observation protocols in which the state *a* (higher) on the property *A* (populousness) tends to occur together with the state *b* (presence of tourists) on the property *B* (season). The more observation protocols are adopted, the more solid the induction will be, so as to be able to affirm a certain link between the two properties on the basis of the comparison between the states of two different properties.

As happens in daily life, in scientific activity, too, the most obvious function of comparison is to highlight differences between objects or, in other cases, regular connec-

tions (or co-variation) between properties. In this way it is possible to establish that a property affects the other. In some situations, the available knowledge does not allow one single causal direction to be established between properties and consequently comparison does not assume an explanatory value. But explanation is not necessarily an aim of the researcher. Sometimes, if there is a certain causal direction, the researcher is simply interested in co-variation between two or more properties.

Summarizing the above, it is possible to reflect on the acts of comparison by focusing on the distinction between «synchronic» and «diachronic» comparison. In the first case, as mentioned, it ignores the temporal dimension whereas the points of time are considered as equivalent; in the second case, it is the time variable instead that is taken as a significant element. Marradi, in perfecting his analysis, highlights a brief outline of his reasoning (Marradi 1987, 118) by which the forms of comparison are essentially divided into six types (Table 1).

Table 1 – Forms of Comparisons

Form	*Points of time*	*Objects*	*Properties*	*States*
S1	1	2	1	2
S2	1	2	2	4
S3	1	2	3	6
D1	2	1	1	2
D2	2	1	2	4
D3	2	1	3	6

The simplest form of synchronic comparison (form S1) corresponds to a statement such as «Carlo weighs as much as Marco». It consists of six logical elements: two objects (Carlo and Marco), one property on the objects (the weight), two states on the property (Carlo's weight and Marco's weight), one single point of time. Examples of this type of comparison can be easily located both in everyday life and in a scientific context. The simplest form of diachronic comparison (form D1) corresponds instead to a statement such as «Carlo is fatter than a year ago». In this case, there is one object (Carlo), but two points of time (today and a year ago). Even this act of comparison consists of six logical elements: one object (Carlo), one property on the object (Carlo's weight), two states on the property (Carlo's weight today and a year ago) and two points of time (today and a year ago). At a conceptual level, the S1 and D1 models of comparison have the same level of complexity, but there are still more complex forms.

Synchronic comparison may in fact be articulated by increasing the number of correlated properties. An example comes from a sentence such as: «On the one hand, Carlo gets good ratings in philosophy, but bad ratings in math. On the other hand, Marco is a good mathematician but a bad philosopher» (form S2). This type of comparison has nine logic elements: two objects (Carlo and Marco), two properties on the objects (school performance in mathematics and philosophy), four states on the properties (the specific level of performance for each subject both of Carlo and Marco), one single point of time. A more complex form instead consists of twelve logical elements (form S3): two objects, three properties, six states, one point of time. An example of this form comes to us from a transnational survey: «In the United States the relationship between father's party preference and the interviewee's party preference is very strong regardless of gender; in France the relationship is rather weak» (quoted by Fideli 1998, 27). In this case, the two objects (the United States and France) are compared on the basis of the states of other objects that are placed at a lower level of aggregation (the interviewed individuals).

Compared to the form D1, a more complex type of diachronic comparison (form D2) thus corresponds to a statement such as: «Carlo tends to gain weight when he eats irregularly». This form of comparison presupposes that the author of comparison considers a presumably large number of observational reports organized into two series: one records the weight changes of Carlo in a given period of time and under the effect of an incorrect diet. The other records the weight change in a period of equivalent time, but under the effect of proper nutrition. In this case we have nine logic elements: an object (Carlo), two properties (the weight of Carlo with irregular nutrition and that with regular nutrition), two points of time, four states on the properties (the specific weight of Carlo in two points of time and on both properties). In a more complex form of diachronic comparison (form D3) we will lastly take into account three or more properties such as in the statement: «Increasing the brightness of the room and reducing the number of operations performed by each worker, there has been an increase in productivity per employee» (ibid., 26). In this case, there are different logical elements: *n* objects (workers), three properties (brightness of the room, number of operations, productivity), *t* points of time, *n*t* states of the objects on the productive property.

Obviously, a scholar interested in establishing causal links, will not be misled into comparing in a synchronic way. Indeed, if we adopt the concept of «cause» restrictively, we can control a causal relationship only through forms of diachronic comparison (in particular D2 and D3). As Marradi reminds us (1987, 78-79), a synchronic comparison can at best lead to identifying unidirectional or bidirectional relationships between operating variables. The concept of causality presupposes the temporal antecedence of

the cause on the effect and this inevitably leads us to consider the placement of the investigated objects on a diachronic axis.

The idea that comparison is realized only between states on one (S1, D1) or more properties (S2, S3, D2, D3) can therefore be accepted. The claim of some scholars to globally compare economic, political, cultural or social system looks illusory. It is not possible to compare an entire nation-state with another one, but it is possible to compare the way some aspects of the two objects (for example, the number of inhabitants, the form of government, the levels of administrative decentralization, etc.) are configured.

The objects should also be compared with each other according to their states on the same properties. We cannot then compare the weight of Carlo with the height of Marco, nor the form of the Italian Government with the French Socialist Party. This consideration leads us to the «dilemma of comparability». When can we say that two objects are comparable? The answer is: when they have at least one property in common. It is difficult to imagine that Carlo and France have properties in common, it is easier for Carlo and Marco, or for France and Italy. This does not mean, or does not necessarily mean, that only similar objects can be compared. Although the presence of equal states on a large number of properties has some advantages, it is not a prerequisite to establish the possibility or the validity of comparison. Once properties have been defined it is possible to compare objects which are very different.

4.1. Styles of comparison

It is now necessary to establish how to assemble information. This process is considered to be «systematic» when states are collected on all the properties. Usually we turn to a systematic collection of information if we want to build a data matrix using statistical techniques. On the other hand, the research is conducted in a «non-systematic» way when objects, properties, and states on all the properties are not defined. Especially among the great comparatists of the past, such as Tocqueville (2003), the tendency to single out properties and their states, neglecting a clear definition of the objects was very frequent. This task is left to the intuition of the reader. Sometimes the objects are clear but the properties studied and their states are not so clear (Smelser 1976; de Nardis 2011b). In this case, comparison assumes the character of a more or less detailed description. A comparison in which the researcher, while defining objects and properties, does not bother to identify the states on the properties of all the objects has to be equally considered as non-systematic. This occurs for example

when, in the comparison of two objects, we introduce a specific event that concerns only one of these objects (such as a revolution, or the participation in a war, etc.).

It seems obvious that a systematic collection of information has many advantages, especially if the aim of the researcher is to control causal hypotheses that extend to more cases. Following the reasoning of Fideli (1998, 50), it is possible to develop a typology of styles of comparison, taking into account both the level of analysis and the use of a systematic collection of information. This leads to the following most popular types: a) micro-analytic comparison without recourse to statistical techniques; b) micro-analytic comparison through the use of statistical techniques; c) ecological comparison through the use of statistical techniques; d) macro-analytic comparison without systematic collection of information; e) macro-analytic comparison with systematic collection of information, but without recourse to statistical techniques.

In the micro-analytic comparison (types *a* and *b*), the objects of the survey are individuals or groups. This style of comparison often requires the use of statistical techniques, especially in the case of trans-national surveys, in which national samples are considered, or in national surveys, in which sub-national samples are considered. In the macro-analytic comparison (types *d* and *e*), the objects are complex systems (national states, societies, cultures) on the basis of their states on global or aggregate properties. This style of comparison is very widespread in socio-political research. As noted by Fideli (ibid., 51), «in general, macro-comparatists do not utilize statistical techniques, but merely bring the outcomes of their research in discursive form». In the ecological comparison (type *c*), territorial units (national, supra-national or sub-national) are compared according to their states on aggregate properties that are often defined at the operational level by utilizing a systematic collection of census and electoral data. Let's see, for example, the comparative work of Ronald Inglehart that analyzes the relationship between the characteristics of the political culture, such as the proportion of citizens who affirm to have trust in their countrymen, with the Gross Domestic Product of some Western countries (Inglehart 1990). This style involves the organization of data in a matrix and their processing by statistical techniques.

4.2. Some methodological knots in comparison

It is now necessary to carry out a brief analysis of the methodological problems that every researcher should solve. Before proceeding with any kind of operation a comparatist should establish: a) the «unit (or units) of analysis» on which the research

should be oriented; b) The space-temporal context in which the research ranks; c) the conceptual definition of properties (or variables).

• *The unity of analysis*

As stated by Kalleberg (1966, 81), before comparing two objects we have to prove they belong to the same class. This general consideration is methodologically correct and leads us to look more closely at the «dilemma of classification» of the social units to be compared. The «unit of analysis» is the type of object to which we attribute the detected information. For example, if the object of our study is the «degree of political activity in Italy», we could extract a sample of center-right and center-left activists at the regional level, and then we could gather more information through targeted interviews to local leaders. The answers to our questions could be attributed to individuals or to the parties to which they belong. In this case, they would become our unit of analysis.

As Zeldich noted (1971, 282), the choice of the unit of analysis should depend on the considerations about the object of research. For example, it is not necessarily useful to identify a single city as the unit of analysis if the objective of the research is the degree of political participation at national level. It is evident that the propensity to a certain political activism is partially influenced by sub-cultural traditions, in addition to the political culture of origin. For this reason, the sample will have to include regions, cities and everything that represents the diversity of the national territory. It is a different matter concerning trans-national research in which we choose the nation as unit of analysis, both for the facility to gather information at that level and for the established trend in the social sciences to identify in the National State «the aim and the outcome of the (alleged) processes of integration and modernization» (Caciagli 1988, 492).

The tendency to identify area and unit of analysis in the nation has repercussions in terms of formulation of terminology, determining the propensity to use interchangeably expressions such as «comparative research» and «trans-national research». In fact, also in trans-national research it is necessary to show a flexible attitude, since the national area is not always the most appropriate for the aims of the research. For example, where the objective of the researcher is to compare cultures or cultural systems we will need to choose which nations have different cultures.

In any case, units traditionally chosen for comparative analyzes (especially if macro-analytical and transnational) are «cultures», «societies» and «nation-states». Obviously, the features that characterize these three elements are often overlapping. In the

definition of a social unit, the researcher proceeds to a classification. It is proposed as an attempt to artificially reduce the sources of variation in the social context within which we place the phenomena. It is therefore necessary that processes and phenomena that are considered parts of a common context are made comparable. Since a class is an attempt to reduce complexity, we must be careful not to oversimplify the issues at stake.

Criticisms of oversimplified classifications all have in common the correct idea that societies grouped in macro-classes end up being so heterogeneous as to present significant elements of homogeneity with societies located in other classes. This limit is likely to contaminate the comparative process (Gusfield 1972; Bendix 1967). Based on this awareness, Smelser (1976) argues that the choice of the social units to be compared should be based on five criteria: a) units of analysis must be appropriate to the type of theoretical problem posed by the researcher; b) they should have a causal relevance for the phenomena under investigation; c) the same unit should not undergo any variation with respect to their empirical classification criterion (ie as nations, societies, and cultures); d) the selection of units of analysis should reflect the degree of availability of data on the units themselves; e) it would be appropriate for the selective choices of the researcher to be based as far as possible on standardized and repeatable procedures.

• *The spatial and temporal context*

After defining the unit of analysis the researcher has to identify the boundary, that is all the cases which will be part of the research and their historical and geographical context. There are studies in which it was possible to consider all the cases part of the population. In various ecological research projects with a nomothetic approach, after identifying the unit of analysis as the nation, for example in a specific geopolitical area, it was possible to consider all nations, which were then compared using the synchronic form. In other empirical situations it may be necessary to consider only a sub-set of cases forming part of a specific population, and, in this eventuality, selection presupposes some precautions. Usually it is inappropriate for the researcher to rely on a random extraction, especially in trans-national research.

We are therefore faced with the problem of the choice of the most appropriate unit to be selected as the sample from the universe (tribes, societies, cultures, nations, etc.). At this level, we find the so-called Galton's problem, from the name of the anthropologist who first recognized it, which states that it is very difficult to identify societies and cultures developed independently since there is a good chance that any simi-

larities are determined by the historical spread of certain cultural characteristics. If this concern is well founded, serious doubts about the possibility of correlating the elements on an intercultural level are justified, as these correlations could be polluted by the interdependence of the cases (diffusion process).

Due to the indefinite extension of the historical diffusion, many sampling problems related to cross-cultural comparisons cannot be solved. Being aware of this, scholars have developed some practical measures to reduce the unintended sources of association. Faced with the problems that occur in defining the proper mode of extraction of cases that have to compose the spatial and temporal boundary of the research, scholars have over the years produced two distinct strategies: the so-called strategy of the «most different systems design» and that of the «most similar systems design».

In the first case (*most different systems design*), the researcher selects very heterogeneous cases. This does not necessarily imply the choice of a large number of cases; it is sufficient that these cases present extreme values on the dependent variable. Two examples of the adoption of this strategy in macro-analytic comparison are the works by Barrington Moore on the *Social Origins of Dictatorship and Democracy* (1966) and by Theda Skocpol on *States and Social Revolutions* (1979). Both scholars select distant cases in space and time, proposing to develop valid generalizations. To define what dynamics can more easily determine the success of a fascist, communist, or democratic regime, Moore considers eight countries (China, France, Germany, Japan, India, England, Russia and the United States). Skocpol, for her part, analyzes the possible causes of the three major revolutions, the French revolution in 1789, the Russian revolution in 1917, and the Chinese one in the thirties, referring to a marginal and sporadic extent to other cases where there was never a revolutionary outcome.

The second type of strategy (*most similar systems design*) has been widely used in comparative research with a micro-analytic approach. A paradigmatic example comes from the work produced by the *Committee on Comparative Politics* of the *Social Science Research Council* that, at the end of the sixties, organized a transnational survey with the aim of testing the hypothesis of a co-variation relationship between socio-economic status and the level of political participation. The survey was conducted in seven countries politically, economically and culturally distant from each other (Austria, Japan, India, Yugoslavia, Nigeria, the Netherlands, and the United States). The research coordinators themselves admitted that the research design was «powerful but risky». It would be powerful if the aim of the scholars was to identify uniformities between different cases. If in fact they had found uniformities in such a diverse group, they would have had some assurance that outcomes were generalizable. But if only differences emerged, the outcomes would be difficult to interpret because each differ-

ence found may be the result of any of the many substantial differences between the selected countries, or, just as easily, a pure artifact of one of the many differences in research procedures (Verba, Nie, and Kim 1978).

The strategy of the *most different systems design* presents a further drawback. Excluding a control on the sources of variation, the comparatist is forced to consider a very large number of independent variables. A problem that does not arise in the case of the strategy of the *most similar cases* (or «controlled comparison»). This strategy is supported by anthropologists such as Eggan (1954, 748) and Kluckohn (1962, 693) and by political scientists such as Eulau (1962, 397-407) and Lijphart (1975). It is assumed that the properties (cultural, socio-economic and political) in which the objects have similar states can be considered as constant. These properties cannot be imputed for the variations of the states on the properties. By excluding similar properties, the researcher reduces the number of properties on which to focus. Similar properties are taken as parametric (or contextual) variables and only the differences are to be considered.

While the advantages of the controlled comparisons are evident, there are some elements of weakness that require caution: first, different levels of the analytical system present various parametric conditions that may lead to changes in the causal significance of the associations; secondly, the belief that the parametric control of a variable can be achieved simply by noting that two neighboring systems, or different levels of a system, are similar with respect to that variable is questionable.

• *Definition of the properties*

In order to perform a comparison, the researcher should avoid using overly specific concepts. The risk is that of not being able to find similar examples in other cultures or groups. Almond and Coleman, for example, expressed dissatisfaction with the ability to compare the traditional concepts adopted in political science. These concepts would in fact be limited by the single reference to Western societies and become totally inadequate when it is necessary to compare political systems structured on different cultures (Almond and Coleman 1960, 3-4). In this regard, the two scholars, using the support of sociological and anthropological literature, endeavored to extract from the classical conceptual apparatus some general concepts, such as «political system», «political socialization», «articulation and aggregation of interests» which could also be suitable for the analysis of emerging or otherwise non-Western political forms.

As Smelser noted, the search for appropriate categories is pulled in two different directions since, on the one hand, to compare different systems one should adopt a conceptual apparatus located at higher levels of abstraction; on the other hand, a greater conceptual abstraction creates an opposite pressure to the re- specification of the rules for identifying empirical indicators, which could be expressed within the various systems contained in more general categories (Smelser 1976). The researcher is continually caught in a vise that, on the one hand, makes him subject to the risk of resorting to specific but limited concepts; on the other hand, he is led to use more abstract and therefore overly inclusive concepts. Sociological literature offers us two possible solutions to this dilemma.

The first solution can be defined as «relativistic alternative». It takes into consideration the contextual variability of each phenomenon therefore remaining faithful to the meaning of the phenomenon itself. In the economic field, Mauss tried to properly represent the various ways in which different cultures have defined the concept of «economic», then choosing only those areas where it was possible to access the «mind of society» through documentation and philological research (Mauss 1954, 2-3). Other scholars, especially in the field of anthropology, are placed on similar positions. In their view, the attempt to conceptualize all problems and tendencies as if they were constant is questionable. They should rather be seen as aspects of the cultural infrastructure (Clark 1970). In general, it would be helpful if the level of abstraction of the variables and general dimensions were commensurate with the field of comparison required.

The second solution consists of an attempt to keep the definition of general concepts on a higher level of abstraction, thus admitting a greater range of variation of the context. Functionalist scholars, whose theoretical approach is based on the definition of specific and invariant reference points, such as the «functional requirements» of society, tend to support this solution. These requirements form the basis for the identification of certain structures, understood as variable expressions of invariant categories (or functions). Functional prerequisites usually refer to things that should be done in every society so that it can continue to operate. For example, generalized conditions necessary for the maintenance of the system (Aberle et.al. 1972, 61).

But, as pointed out by Lucian Pye (1958), in non-democratic or at least non-Western countries the political sphere is rarely sharply differentiated from the sphere of personal and social relationships. This requires the researcher to make certain considerations that the functionalist approach tends to overlook. It will be very likely that, in the case of Western systems, the processes of political influence are more easily registered in the form of formal exchanges between politically relevant units (parties, groups,

movements); while in the case of non-Western systems, the same processes presumably take a less differentiated and more informal form. In this case, the researcher should consider the different models of kinship and often tribal social interaction to be able to infer the peculiar patterns of political influence. Scholars who identify with the functionalist paradigm have never developed convincing rules for the specification of the empirical indicators that reflect the different functions within social systems. Moreover, this effort is likely to be futile since, as Sartori noted, each structure, from country to country, can perform more than one function and often different functions, so that the same function finds structural alternatives and can be performed by different structures (Sartori 1970).

Now we come to the question of the empirical indicators whose comparability, we have seen, depends on both the classification procedures of units of analysis and the variable they should represent. Following the reasoning of Smelser, we can pose the matter of the comparability of indicators in the form of two basic questions: 1) Is the process by which an indicator has been created consistent with the theory of that process more or less implicit in the mind of the researcher? To put it in other words, is the indicator valid? That is, to what degree can it actually provide a measure of the variable to which it refers? 2) In the case of comparative analysis of dissimilar social units, is the process by which the indicator has been generated the same as that used in all the units of analysis considered? This second question raises the problem of «equivalence», and then, from the point of view of measurement, of the measure's reliability in different contexts of analysis.

The choice of the indicators, and therefore their consequent validity, is not based on the characteristics of the indicator itself or on the criteria adopted for the identification of possible measurement errors in each indicator, but rather on the theoretical purposes for which it is necessary to apply the measure and its correspondence with the logical meaning of the variable represented. Last but not least, the validity of an indicator depends on an implicit understanding of the existing relationship between the process by which it is produced and the theoretical purposes of the researcher. The problem of «equivalence», and therefore the comparability of measurements taken from different social units, concerns the need to determine whether a phenomenon measured in the same way but in different systems can be considered an indicator of the same variable.

The same problems of comparability arise in various ways in different social research regardless of the methods used. In fact, when the researcher is actively involved in the production of data, he can theoretically control certain sources of error, but it is also possible that the active role of the researcher may be a harbinger of further errors. For

example, in the case of processing of a questionnaire, the problem arises of the translatability of questions and concepts that in different systems can assume different meanings (Ervin and Bower 1952). The same questionnaire can cause different reactions depending on the culture of the population to whom it is distributed (Wilson 1958; Scheuch 1968; Mitchell 1968).

All these problems substantially affect the variation of the context of the indicators in different social units (Przeworski and Teune 1966). Also in this case, scientific literature proposes several solutions that correspond to the attempt to control some sources of error. Economists, for example, in order to have adequate measures of the real income in different countries have developed tricks to incorporate non-monetary economic indicators in the context of detections of national income, reducing the margin for error in the measurement (Bennett 1966; Beckerman 1966; Beckerman and Bacon 1966). Political scientists have instead developed measures to incorporate some sources of error in aggregated indexes in order to increase the comparability (Gurr 1966; 1968). Psychologists use non-verbal tools and projective tests to increase the degree of cross-cultural comparability, in an attempt to avoid the sources of error due to variations in language (Anderson 1967).

In macro-analytical comparisons the problem of equivalence is solved with an emphasis on the functional structures. Barrington Moore (1966), for example, compared bureaucracies, social classes and political movements, which in his view had played a role in promoting the modernization process. In other macro-analytical research, links of structural equivalence are defined as in Sartori's research on the relationship between electoral systems and party systems (Sartori 1976; 1982). According to this logic, it is possible to state that the American and the British two-party system are structurally similar. When defining a property the researcher always has to consider the contextual dimension even if the comparison then requires the extraction of the properties themselves from their context. This poses a problem of «contextual equivalence» that arises in all comparative research. Sometimes the reduction of the spatial and temporal context helps to limit the risk of a weak equivalence in the lexical (and operational) definition of the properties.

In any case, the dilemma of the conceptualization and the relative level of abstraction as well as that of equivalence probably cannot be solved by reducing the abstraction in favor of a higher specification, nor, as functionalists would, through a taxonomic approach, which therefore prefers overly high levels of abstraction. Again, the issue may be solved by referring to the theoretical aims of the researcher and of the comparison level to which he actually aspires.

5. On the relationship between history and sociology

When we speak of diachronic comparison, as well as of idiographic approaches or of the case study method, we are implicitly referring to the history's contribution to sociology. The social sciences have a long tradition of comparative-historical studies. The founders of our discipline had used the historical comparison approach as the backbone of almost all of their work. Even after the twentieth century division of social science into many specialized disciplines, historical-comparative research maintained some relevance. It is only since the mid-twentieth century that we have witnessed a partial eclipse of historical studies in the social sciences in favor of studies aimed at producing more and more universal generalizations and, as such, difficult to relate to an approach that placed investigations in a limited spatial and temporal dimension.

In recent decades, there has been a resurgence of interest on the part of sociologists and political scientists in a research approach that connects to the old tradition of historical and comparative studies. This resurgence of sociological taste for historical analysis is linked to the need to explain structural processes that unfold on a large scale and that are attributable to the different aspects of the social change. Scholars have abandoned abstract generalization, without giving up the ability to produce causal explanations. Cases and processes are analyzed at a lower level of abstraction, trying to explain the present also and above all by drawing important lessons from the past.

So-called historical sociology aims to shed light on the meanings within specific contexts, focusing on the historical sequence of social phenomena but without confining them to the narration and always trying to identify the particular (and potentially recurring) aspects of specific social structures and specific patterns of change.

In the years immediately following World War II, with the tendency of many scholars to investigate the so-called *Grand Theory*, which is a theoretical paradigm able to definitively come to grips with the social reality, the attention to historical processes was eclipsed by general theories of society or by radical forms of abstract and a-historical empiricism. Wright Mills, one of the best interpreters of American critical sociology, in one of his most passionate essays, stated his disagreement with some sociological trends with particular reference to the anti-historicism typical of the new theoretical and empirical paradigms, stating with clarity that every social science - or rather, every social study worthy of note - requires the historical significance of the concepts adopted and a great use of historical materials (Wright Mills 1959, 145).

In his famous *What is History?*, the historian Edward Hallett Carr, in a passage in which he reflected on the relationship between sociology and history, said:

> If [sociology] is to become a fruitful field of study, it must, like history, concern itself with the relation between the unique and the general. But it must also become dynamic – a study not of society at rest (for no such society exists), but of social change and development. For the rest, I would only say that the more sociological theory history becomes, and the more historical sociology becomes, the better for both (Carr 1963, 84).

Carr's reflection is worthy of consideration. The invitation to integrate the unique and the general, going beyond the classical controversy between the idiographic and the nomothetic, would be possible mainly through the adoption of social theories rooted in historical processes. Just as the study of social change presupposes the assumption of good theories rather than good methods, sociology should focus on the study of the connections between the great changes and the changes they produce in the dynamics of social life. On this, Tilly noted (1981, 212), it is possible to identify an initial convergence between history and sociology. This convergence has long been present in social history, where we can find two fundamental callings, the first is «retrospective» and the second «perspective».

In the first case, the scholar (historian or sociologist) assumes certain features of the contemporary world as problematic and then moves retrospectively to trace the origins and transformations of certain phenomena. According to Tilly, the two aspects of the contemporary world that most distinguish our age compared to the times and places of the past are, on the one hand, the prevalence in the productive world of wage labor under conditions of substantial expropriation; on the other hand, the great power of nation states. If we agree with this idea, a retrospective analysis should focus on the study of the processes of proletarianization and construction of the states, as well as on the interactions between the two phenomena and their contemporary developments.

In the second case, the scholar wonders what would have happened if in some decisive moments in history when the people (or their leaders) were faced with two or more options, we had taken one way rather than another. It is a question of understanding how and why they prevailed over other historical options. Both callings (retrospective and perspective) or approaches can be useful to the work of historians and sociologists.

According to Tilly, the approaches of sociologists and historians to the analysis of social events are different, but there are good reasons to try to identify the parameters for a practical synthesis of the two approaches based on the need to develop historically grounded social theories. Such an effort necessitates our careful reflection on the merits of historical research. First, we should restore some conceptual order by affirming the importance of the work of historians. There have been, especially in sociology,

scholars who expressed the conviction that they were able to analytically grasp social cases without knowing their historical origins, namely the specific contexts from which these cases emerged. This sociological effect is clear in the following words by Lipset:

> From an ideal-typical point of view, the task of the sociologist is to formulate general hypotheses, hopefully set within a larger theoretical framework, and to test them. His interest in the way in which a nation such as the United States formulated a national identity is to specify propositions about the general processes involved in the creation of national identities in new nations. Similarly, his concern with changes in the patterns of American religious participation is to formulate and test hypotheses about the function of religion for other institutions and the social system as a whole. The sociologist of religion seeks to locate the conditions under which the chiliastic religion occurs, what kinds of people are attracted to it, what happens to the sects and their adherents under various conditions, and so on. There are clearly no problems of the historian. History must be concerned with the analysis of the particular set of events and processes. Where the sociologist looks for concepts which subsume a variety of particular descriptive categories, the historian must remain close to the actual happenings and avoid statements which, though linking behavior at one time and place to that elsewhere, lead to a distortion in the description of what occurred in the set of circumstances being analyzed (Lipset 1968, 22-23).

As Tilly (1981, 5) observes, the question of the division of labor between sociologists and historians, as expressed by scholars such as Lipset, is essentially similar to that «between the mycologist and the mushroom collector, between the critic and the translator, between the political analyst and the city hall reporter, between brains and brawn. History does the transcription, sociology the analysis». This is a clear mystification to which, it should be said, historians have often contributed, as we can see from these words by Gareth Stedman Jones:

> Attitudes toward sociological theory among sociologically inclined historians have often verged on the credulous, and although more critical sociologists might have rejected as naively positivist any distinction between history and sociology which sees the one as "idiographic" and the other as "nomothetic", many of these historians have behaved in practice as if they considered such a division of labour to be legitimate. Defensive about their own subject and repelled by an inadequately understood Marxism which appeared to be the only other contender, they have looked uncritically to sociology as a theoretical storehouse from which they could simply select concepts most serviceable for their individual needs (Stedman Jones 1976, 300).

History cannot be seen as a kind of failed sociology, just as historical materials cannot be treated as raw evidence waiting to be sociologically analyzed. In this regard, Charles Tilly offers a double argument through a distinction between «matters of fact» and «matters of principle» (Tilly 1981, 6). On a strictly factual ground, historians conduct their investigations following rules that differ significantly from those governing social science research, just as historical materials generally differ from those used in sociology. In terms of principle, it should also be said that any analysis of social processes is equally historical. In fact, an analysis is historical only when it takes into consideration the time and the place of the action in its explanations. From this point of view, the classic distinction between "generalizing" (or nomothetic) and "particularizing"(or idiographic) disciplines is not adequate. Historical analysis must be characterized by the integration of time and space. It is mainly the sociological analysis of change on a large scale to have an insufficient historical awareness. Therefore, sociological theory needs to be grounded in history, that is, embedded in time.

Both sociologists and historians, while following partially different logics, cannot refrain from seeking more adequate theories to investigate historical and social contexts. To achieve a similar result we should further explore the terrain of history. As Tilly observes (ibid., 12), the word "history" refers, at the same time, to a «phenomenon», to «a body of material» and to a «set of activities».

A) As a phenomenon, history represents the cumulative effect of past events on present events. Let us think of the phenomenon of industrialization; scholars are divided between those who believe that the processes of capital accumulation, economic growth, exploitation of labor force, recur in a number of countries, following more or less the same lines, and those who believe that these processes vary depending on the mode of industrialization of the countries that first initiated the dynamics of accumulation. Only the members of the first group can obviously adopt common procedures for synchronic comparison, since they assume the irrelevance of the temporal dimension; the members of the second group will avoid those forms of cross-sectional comparison, paying greater attention to the dynamics of historical development.
B) Seen as a set of materials, history appears as a persistent and residual body of past behaviors that can be brought to light through old news reports, witnesses' accounts, autobiographies and other narrative materials that may represent a small slice of past experience. Historians have generally focused primarily on written evidence, although any remnant of the past, from working tools to graffiti left on walls, can constitute a small fragment of a past life.

C) Viewed as a set of activities, history is an attempt by scholars to reconstruct the past. An attempt that, according to Tilly (ibid., 13), is likely to be hopeless for two reasons, which, after a little reflection, will actually appear obvious. First, the availability of information on the past is likely to be almost inexhaustible, exceeding the effective capacity of even the most slavish historian to collect and synthesize them in a comprehensive way. Historians are compelled to make a choice by selecting only a small portion of the material available to them. Second, historians have to pick just a few of the many events occurred in the past, depending on the specific question on which the research design is built. Once the objectives of the survey are clearly defined, other information that is not closely related to them may be deemed irrelevant.

In a few words, historical writing is based on the following aspects: those who commit themselves to this work specialize in the reconstruction of past behaviors; they rely mainly on narrative texts that represent the remnants of the past; they emphasize only selected pieces of text taken as the most suitable means to perform the task of reconstruction; they consider "where" and especially "when" some specific events are relevant for their impact on social life, and may therefore constitute essential elements for their own explanation. The fact that the function of historical work is easily identifiable, does not mean it will always proceed according to an ordered pattern:

> In reality, the practice of history resembles a zoo more than a herbarium, and a herbarium more than a cyclotron. In a Cyclotron a huge, costly, unified apparatus whirs into motion to produce a single focused result; history does not behave like that. In a herbarium, a classificatory order prevails; each dried plant has its own niche. Historians divide their subject matter and their styles of thought into diplomatic, economic, intellectual, and other sorts of history, but the divisions are shifting, inexact … and often ignored in practice (ibid., 15-16).

However, stating that historical practice is often methodologically inconsistent and inaccurate does not mean that historical processes are without meaning for the social sciences. Many social-scientific disciplines that have developed as if the historical origins of social phenomena were of no importance – particularly anthropology, sociology and political science – feel the need to restore their historical connections.

5.1. The historical analysis of the structural macro-processes

With the development of sociological practice, especially during the twentieth century, the historical content of social processes was gradually dried up in the illusory attempt to create a sort of natural (a-temporal) science of society. Only in the sixties and in particular the seventies of the twentieth century would eminent sociologists rediscover a taste for historical connections, especially in dealing with important issues such as industrialization, control of forms of rebellion and revolution, and family structure. A taste for historical and comparative analysis of large-scale processes of change began to spread among some social scientists, mainly because of disappointment over the ineffectiveness shown by classical models of modernization and development.

Sociological analysis has often had to undertake the study of history when dealing with two areas: first, large-scale structural change, and second, collective action with particular reference to the analysis of social movements, rebellions and revolutions. The search for general patterns in processes of industrialization, rationalization or political development leads scholars to make a double effort: on the one hand, they must identify the traits of great processes of change in specific historical periods, and on the other, they must connect specific transformations that were taking place in those times to the macro-processes of change previously identified. The attempt to formulate some general laws underlying revolutions or social movements, therefore, involves the need to find some regularities in collective action in specific historical periods. According to Tilly (1981, 44), in our time the two macro-processes to consider are undoubtedly represented by the expansion of the capitalist system and the development of nation states (as well as by the resulting system of states).

If we agree with this idea, the historical problem we have to face lies in the need to determine how and why processes of capital accumulation occurred with the resulting dynamics of proletarianization; how and why the system of production relations spread, and finally what consequences resulted from this expansion. The temporal element here is essential and historical analysis indispensable. Moreover, there is the question of the nation state, understood as a complex organization in a position to monopolize the means of coercion in a specific territory. The nation state is autonomous, centralized, and its lines of internal division are formally coordinated, making it different from other organizations working in the same area. From this point of view, States are a relatively new phenomenon, since we can detect their traces only in the past few hundred years. Even the international political context, in Renaissance Europe, was largely characterized by formally independent political units, which were far from resembling the system of states typical of our times. Modern states can be histor-

ically analyzed both in their internal dimension, by focusing on the dynamics through which some organizations manage to exercise a certain domination over the populations of a given territory, gradually becoming a State, and in the external dimension, by observing how those organizations defend their domination against pressure from outside organizations (other States). In both dimensions the question of War becomes crucial. Internally, war pushes rulers to exert strong pressure on their people in terms of taxes, conscription and requisitions; externally, it leads them to pursue war efforts through which they can affirm their right to exclusive control over a given territory.

Now let us dwell briefly on the process of proletarianization that between capitalism and the nation-state is a very important concept for the analysis of structural macroprocesses. The proletarianization involves a set of processes that have involved a growing number of individuals. The workers lose control over the means of production and to survive are forced to sell their labor power in exchange for a wage. The characteristic features of proletarianization are therefore the monetization of the economy, the expropriation of work by the owners of the means of production and the development of capitalism.

It is a phenomenon that has most influenced the dynamics of social life above all in the Western world. According to Tilly (1981, 179), sociologists have failed to explain it in a correct and consistent way because of the distortions induced by Durkheim's theory on the dynamics of differentiation and integration (Tilly 1984). The problem of sociology lies essentially in the adoption of one bad theory. Only neo-Marxist historians and sociologists have been able, within the limits of a certain ideological approach, to give an account of these processes in an appropriate manner.

According to the prevailing sociological approach, social differentiation leads to greater productivity which, in turn, determines greater prosperity. It is always the differentiation which, through a growing interdependence among individuals, induces a transformation of habits in social life. What causes this differentiation, however, remains unclear. No explicit or implicit reference is made to the development of capitalism and the consequent process of proletarianization that, according to Tilly, can have three different meanings useful for analytical purposes:

A) According to the more restrictive definition, proletarians are all those individuals who receive a salary in exchange for unskilled labor which is realized in large factories and regulated by an intense discipline. The characteristic elements of the process of proletarianization, according to this definition, would constitute the fragmentation, degradation and intensification of work. In this sense, it would be a

typical phenomenon of the nineteenth century and of the process of capitalist industrialization.

B) There is also a broader definition, according to which proletarians would be all those who sell their workforce in exchange for a wage, regardless of the context in which the work takes place. According to this approach the process of proletarianization would be realized in any production context, from cornfields to factories and to all the workplaces that in the twentieth century have been structured within the tertiary sector.

C) There is then a final definition that we believe is best suited to the analysis of the processes of conflict in the nineteenth century and a good part of the twentieth, which is due to Marxian analysis expressed in the first book of Capital (Marx 1906), in which the concept of proletarian (and proletarianization) is applied to the world of the factory in a historical context of growing industrialization, but also to the agricultural world and, in particular, in the conflictual relations between the workers of the soil and the great landowners. According to this approach, anyone who is forced to sell his labor to the capitalists without any effective control over the means of production is designated a proletarian. In this sense, Marx's analysis emphasizes the features and processes of capitalist expropriation of labor. «Capitalism» and «proletarianization» are two related phenomena that can explain the transformation of social life between the eighteenth and twentieth century in a much more effective way than other phenomena such as «industrialization» and «modernization».

It is in this context that the classic questions of political sociology are posed: how are the ruling class unable to maintain control over the economic and political life of a given area? Under what conditions can a population be active, organized and informed with respect to national politics? How are riots, rebellions and revolutions made? In this way, we can assume the power asymmetries and the participatory processes as historical problems to be connected to the two macro-processes represented by the development of the national states (and the system of states) and the expansion of the capitalist system of production.

«Capitalism» and «statemaking» provide the backdrop for historically grounded analysis of collective action and the ways individuals act together in pursuit of shared interests.

> Instead of the eternal behavior of crowds, we study the particular forms of action that people use to advance claims and register grievances. Instead of laws of social movements, we study the emergence of the social movement as a political phenomenon. In-

> stead of power in general, we study the modalities of power within a certain mode of production (Tilly 1981, 46).

In particular, the two macro-processes identified above influence the direction of change, acting on three fundamental components of collective action: the «interests» around which individuals decide to act collectively; their «capacity» to act in defense of those interests; and the «opportunity» to advance or defend those interests through coordinated collective actions. These are all issues of great relevance for the old as well as current political sociology.

5.2. How to compare the historical macro-processes

After identifying the macro-processes that shaped modernity and that, with the necessary updates, are still the focus of political sociologists, we should understand how they can be compared. Here too we make use of the reflections of Charles Tilly.

Firstly, we can then compare them with actual historical cases, trying to identify alternative readings. Secondly, which is closely connected to the first, it is necessary to look for forms of generalization that are rooted in historical processes. In this sense, we do not need to pursue universal statements, more or less confirmed by a variety of instances occurring in different places and at different times; rather, we need to connect a set of specific cases and variables to different periods and contexts, linking together similar cases, being constantly aware of their space and time limits. It is at this point that historical comparison becomes crucial to describe and explain structural dynamics and large processes.

The analysis of structures and processes is conducted, according to the systematization provided by Tilly, at four historical levels: 1) at a «world historical level», the researcher's task is to identify the specific properties of an era, contextualize and fix them in the flow of human history. At this level, for example, we can find the different patterns of social evolution, the rise and fall of empires, the development and entrenchment of specific production patterns; 2) at a «world-systemic level», the researcher's task is to discern connections and changes in the most important part of a broad set of interrelated social structures; 3) at a «macro-historical level», the researcher must give an account of structures and processes also mentioning their alternative forms in graphic form; and 4) at a «micro-historical level», the researcher's task is to trace the connections of individuals and groups with such structures and processes, in the hope of being able to explain their impact on social life (Tilly 1984, 60-61).

Structures and processes are deemed relevant, therefore, depending on the level of analysis. At a world-historical level, the structures on which the attention of the researcher is focused are those generally ascribable to the category of world-system, while the relevant processes are related to the transformation and the historical sequence of systems understood in their entirety. At this level, any discourse on the processes of urbanization, industrialization and state-building would be inappropriate, as it would occur at a lower level than the wholeness of the world system. If a researcher chooses to operate at this level, any comparison, if necessary, should be based on a comparison between world systems and, as Tilly states, «My eyes falter and my legs shake on this great plan» (ibid., 63).

At a historical systemic level, the dimension of world system continues to have its importance even if, in this case, the scholar focuses on those world-system components that are based on networks of coercion and/or exchange. In the first case, the focus is mostly on the dimension of the nation state understood as a more or less centralized, differentiated and autonomous organization that has the capacity to control the means of coercion within a limited geographical area. In the second case, the researcher focuses on the patterns of production at a national or regional level, specifically on the set of relationships between geographically segregated and interdependent individuals and groups that have certain factors of production. In this case, the most important processes are those related to the dynamics of production, distribution and subordination. The comparison is here intended to establish similarities and differences between networks of coercion and exchange, as well as between processes of subordination, production and distribution. At this level any attempt at generalization is dangerous, controversial and difficult to verify.

With the macro-historical level, according to Tilly, «we enter the ground of history as historians ordinarily treat it» (ibid.). Within a given world system, we can certainly build states, modes of production, army associations, enterprises, networks, gradually giving life to our unit of analysis. At this level, processes such as proletarianization, accumulation of capital, urbanization, state-building, bureaucratization are suitable for our analysis. In this case, the comparative measure is based on a comparison between these units, through which structural and procedural uniformity, variations and combinations can be identified. Their systematic study in specific macro-systems fully falls within the logic of a historically rooted analysis that should be taken as the foundation of our cognitive activity. This should not lead us to underestimate the dimension of micro-history.

When we analyze the impact of structures and processes on individuals and groups, we will necessarily draw a connection between personal experience and historical process. In this case, the frames of reference concern the relationships between individu-

als and social groups while processes are related to the transformation of the relations between individuals connected to those structural dynamics. If the researcher works at a micro level, any distinction between interactions and relationships will lose some of its meaning.

Comparisons between systems of relationship and their transformation take shape and consistency in the close link between those systems of relationship and structural and procedural dimensions. In other words, the relationship between capitalists and workers makes sense only within the broader historical process of proletarianization and concentration of capital. Among the four levels of analysis, we prefer, with Tilly, to dwell on the comparisons conducted at the macro-historical level and particularly on that borderland comprising the connection between macro- and micro-historical dimensions.

The objective is to identify a comparative approach able to account for the structures and processes that take place within a specific world system, so as to produce some limited – i.e. historically determined – generalizations. Since we aim to identify some regularity in such historical structures and processes, we do not need to analyze a large number of statistically treated instances. Comparative analysis of socio-historical processes and structures is most fruitful when we focus on a limited number of instances and «that is not because of the intrinsically greater value of small numbers, but because large numbers give an illusory sense of security» (Tilly 1984, 77). In the analysis of a small number of instances, the researcher has the opportunity to focus on the historical circumstances and the specific characteristics of each case, in order to identify some common features needed for comparison.

Even if we abandon society as our unit of analysis, it does not mean that we must also abandon the dimension of nation state; what we need is an awareness that our points of reference are a territorial area and a population controlled by the state institutional system and not a thing apart, as stated in the first pernicious postulate. Of course, researchers have some alternatives, meaning that, instead of the State, they can select different units of analysis, such as entire blocs of international powers, cities or city networks, regional modes of production, social classes, and so on. What is important for researchers is to have a clear idea of the objects of their analysis, before they produce any theoretical proposition.

We can distinguish between different ways of comparing big structures and processes by classifying the different propositions that can potentially be drawn from comparative analysis. To do so, for example. Tilly combines two dimensions of comparison: one based on the «sharing of all instances» and one that is based on a «multiplicity of forms». The first dimension refers to those accounts that emerge from a comparison

ranging from the analysis of a single event – aimed at highlighting the specific features of the case itself – to the analysis of more instances – intended to bring out the characteristics of all the cases considered. The second dimension refers to those accounts that emerge from a comparison ranging from single – when all cases of a phenomenon have common properties - to multiple - when there are different forms of a phenomenon. By combining the two dimensions, four possible approaches to comparison emerge: «individualizing», «universalizing», «variation-finding», and «encompassing» comparisons.

Individualizing comparisons are those that treat each case as essentially unique by minimizing the significance of any property in common with other cases. Purely universalizing comparisons, in turn, are based on the identification of common properties in all cases. On the other hand, we have those types of comparisons that are based on the search for possible variations (variation finding) and, in particular, on the belief that we can establish a principle of change in the nature or intensity of a phenomenon starting from a systematic analysis of the differences between a number of instances. Encompassing comparisons are instead based on the analysis of different instances in different places within the same macro-system. The purpose of this form of comparison is to explain the characteristics of each case in the light of an evolving relationship with the system as a whole.

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