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## Embracing the particular: a research agenda for Globalizing International Relations

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### Citation

Newby, V. F. (2021). Embracing the particular: a research agenda for Globalizing International Relations. In B. Futak-Campbell (Ed.), *Globalizing regionalism and international relations* (pp. 49-73). Bristol: Bristol University Press. Retrieved from <https://hdl.handle.net/1887/3249873>

Version: Publisher's Version

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**Note:** To cite this publication please use the final published version (if applicable).

# Embracing the Particular: A Research Agenda for Globalizing International Relations

*Vanessa Newby*

In part thus, the division has been one between those who crave knowledge in the form of universal propositions and discount the merit of ‘mere description’, and those who revere the unending uniqueness of human experiences and see mainly empty words in abstract formulations. (Pye, 1975: 6)

In the course of my daily duties as an academic, I am often approached by international relations (IR) students asking me how I learned Arabic during my PhD and what is the best way for them to do the same. More often than not, I find myself simultaneously sympathizing with their plight and then dissuading them from trying to complete a PhD in IR and learn Arabic at the same time. The discomfort I experience when doing this comes from the hypocrisy of my advice: it’s a classic case of ‘do as I say and not as I did’.

The reason I dissuade students from language learning and deep regional embeddedness is because I found to my dismay that learning Arabic and building a nuanced, deep knowledge of the Middle East did nothing to improve my job chances in IR; and in some cases my

regional knowledge has been regarded as a hindrance and not a benefit by potential employers.

On more than one occasion in job interviews, my skill set was challenged with the question of whether or not I considered myself a Lebanon specialist only.<sup>1</sup> Furthermore even when jobs in IR were advertised as specifically seeking Middle East expertise, I found this to be a misnomer: universities wanted people who had researched case studies in the Middle East, not people who actually knew the region and spoke the language. In sum, I can honestly say that I cannot think of one example of when deep regional knowledge has been of benefit to my academic career in IR. The only time it comes in handy is when I am asked to write for a generalist audience or speak to the media. Until now, in these spaces alone has my regional knowledge been considered useful and valued.

The Globalizing IR project seeks to include regional voices more fully into IR and move past the ethnocentrism of mostly North American and European scholars. Despite increasing recognition that gender and racial diversity in the field is essential (see, for example, Brown, 2001; Tickner and Wæver, 2009; Peters and Wemheuer-Vogelaar, 2015; Maliniak et al, 2018), the classical theories that students draw on in their IR training were largely conceptualized by white men from the Global North. The question then of how we should incorporate regional knowledge and Area Studies scholarship remains extremely pertinent to this project. Only by detailing the experiences of states and regions outside of the United States (US) and European spheres can we really build an inclusive IR that when theorizing draws on a global complement of views, and recognizes the ethnocentrism that has been inherent in previous theorizing.<sup>2</sup> For example, what assumptions about how the world works characterize Latin American or Indian or Middle Eastern IR? What does the concept of human security look like in the Pacific Island region? How useful is our current theorizing on regions to states outside of the Global North? These questions and many more are what IR needs to have a firm grasp on if it is to be truly globalizing. This means finding pathways to the production of knowledge that provide these insights and ensuring that these pathways are not marginalized. It also means embracing the particular and at times inverting the rational of the scientific method that eschews detail for generalizing laws, especially laws that are grounded in European and Western-centric assumptions.

This chapter comprises three sections and addresses two key challenges faced by both students and academics of Globalizing

IR: how to incorporate Area Studies knowledge into IR; and how to conduct research using methods that enable researchers to simultaneously capture the particular and theorize. The first section provides a brief history of the debates between IR scholars and Area Studies specialists to show why IR currently lacks the detailed regional knowledge needed to advance the Globalizing IR agenda. It reveals how critiques of Area Studies have been closely connected to epistemological developments: the more IR has aligned itself with the 'scientific method', the more it has distanced itself from Area Studies. As a result, IR has often ignored, avoided or downplayed knowledge generated by scholars of regions and individual states. This section is intended to provide insight into how and why regional knowledge has been sidelined or treated as epiphenomenal in IR. The second section discusses how methodology has also played a role in restricting our regional knowledge, in particular how neopositivist methodology can limit and proscribe research being carried out in IR. The third and final section then offers some practical suggestions for uncovering local and regional insights using pragmatic versions of process tracing, comparative regional methods and analyticism. I draw on these methods in particular to highlight the potential for theory building, which, I argue, Globalizing IR is in most need of currently.

### **IR theory versus Area Studies<sup>3</sup>**

Prior to a discussion of the history of the debates between IR and Area Studies, a clarification of terms is needed. I refer to Area Studies here as scholarship that broadly defines itself as area specialist and often goes by the names of Asian studies, African studies, Latin American studies and so on. Here I agree with Basedau and Köllner (2007: 109) that:

Many area specialists would probably agree with Szanton (2002) who suggests that 'Area Studies' is best understood as an overarching term for a family of academic fields and activities joined by a common commitment to: (1) intensive language study; (2) in-depth field research in the local language(s); (3) close attention to local histories, viewpoints, materials, and interpretations; (4) testing, elaborating, criticizing, or developing grounded theory against detailed observation; and (5) multi-disciplinary conversations often crossing the boundaries of the social sciences and humanities. (Basedau and Köllner, 2007: 109)

I do not refer here to comparative politics, which, like IR, is considered a sub-discipline of political science (in the US at least) and stresses the importance of strong methods to conduct comparative case study research and which does not require or assume embeddedness in a region.<sup>4</sup> This group of scholars would not consider themselves area specialists in the way that I refer to the term here. Of note is that some contributions to the debates outlined in this chapter have elided or conflated comparativism with Area Studies. I have tried here to separate out the multiple debates on the contribution of Area Studies to social science scholarship by discussing the criticisms from the viewpoint of several disciplines, political science/IR and the humanities, and the debates within Area Studies itself about what it should or should not be doing. Finally, I highlight potential pathways for greater inclusion of Area Studies within the Globalizing IR project.

Debates on the rise and fall of Area Studies have punctuated the field of IR since the end of the Second World War. Prior to 1945, area specialists were often embedded in colonial states and working for the colonial project (Mehler and Hoffmann, 2011). As the Cold War took hold and decolonization occurred, policy makers became aware of the need for knowledge of other regions of the world and that included knowledge of other languages (Pye, 1975). The first report on this issue was drafted by three Japan Area Studies scholars for the American Social Science Research Council. It pleaded for an institutionalization of Area Studies to achieve three objectives: 'to extend the relevance of the humanities, including the study of foreign languages, in a rapidly changing world; to link the humanities to the social sciences across a broad range of interdisciplinary endeavours; and to safeguard the American national interest in what was rapidly becoming a global confrontation with communism' (Katzenstein, 2001, 789).

International politics, and its effect on funding has always played a key role in the increase or decrease of Area Studies research. As a result of the Cold War, in the 1950s Area Studies received significant funding from private donors, and centres were established that cut across disciplines in many US universities funded largely by the Ford Foundation, Rockefeller Foundation and the Carnegie Corporation (Pye, 1975). This trend was followed later, albeit less extravagantly, in the UK but in this case the initiative came from government.<sup>5</sup> Just as the Cold War fuelled funding, so it was reduced after the end of the Cold War as policy makers decided there was less need for specialist knowledge of particular regions (Katzenstein, 2001; Acharya, 2006). At the same time, globalization contributed to a belief that English was the global lingua franca and there was no need for

the in-depth language training required 50 years ago (Bates, 1997). Subsequently, the events of 9/11 provided impetus for new calls for the revitalization of regional expertise and language skills.<sup>6</sup> IR's inability to predict important global events such as the Arab Spring and the end of the Cold War has continued to reinforce the need for nuanced regional knowledge.<sup>7</sup>

Aside from funding, the relationship between political science and Area Studies has also been heavily influenced by debates within political science about scientific standards and the production of knowledge. Pye (1975) notes that as political science became more concerned about using rigorous scientific methods borrowed from the natural sciences, the more scientists turned to using subjects from their own cultural context because of the ready availability of usable data.

Proceeding from the assumption of modern social science that human behaviour reflects certain universal consistencies, and therefore the same theories should apply to all men, all societies, all economies, some social scientists jumped to the convenient conclusion that since all must adhere to the same rules, then any generalization about the immediate can be taken to apply to all.... This legerdemain in logic thus dismissed, faster than the academic eye could see, the difference between inflated generalizations about Western behaviour and universal scientific truth. (Pye, 1975: 7; see also Alagappa, 1998; Acharya, 2006)

This development led to the idea that general theories were 'common sense' and anything that focused on the particular was specialized. For example, Pye notes that a study on American voting behaviour would be given a title that suggested a general investigation, whereas a study carried out in an Asian or African country would 'almost invariably be given a title that would reveal its specific aspects' (1975: 6). This has serious consequences for scholars from the Global South whose focus on their own region risks being shunted aside as a 'specialized topic' as opposed to reflecting a political science analysis of the IR or politics of their region. Furthermore, Acharya (2006) comments that often alternative ways of doing IR are not recognized or ignored because they do not fit with mainstream IR theory that is based on the ethnocentric assumptions of North American political science (Acharya, 2006). He notes that work that has tried to examine a state or a region as is, to understand how it functions, has 'been described variously as 'a-theoretical', 'journalistic' and 'mushy'. The authors of

such work are faulted for not knowing statistics, for 'offering resistance to rigorous methods for evaluating arguments', for not generating 'scientific knowledge' and for being 'cameras', rather than 'thinkers' (Acharya, 2006: 2; see also Shea, 1997). The atheoretical nature of much work in Area Studies that prevents comparisons is considered weak as it is unable to build or test general law-like theories (Shea, 1997; Teti, 2007).

Other criticisms of Area Studies within IR are questions regarding the objectivity of the findings. My personal experience has been that IR scholars typically view embeddedness or prolonged fieldwork with suspicion. There is a fear that the 'objective scholar' no longer has a clear view of the value of her findings because she has become too close to her subject matter (Katzenstein, 2001). Other more warranted concerns are that without a broad understanding of IR, the in-depth study of one country might lead to the scholar erroneously attributing a process to a single state and overlooking the fact that the same process occurs in other states (Modelske, 1961). Objectivity may also be compromised by the scholar's relationship with the host government. The scholar may avoid some areas of study or discussion for fear of repression or banishment (Szanton, 2004). This issue applies as much to native speakers as it does to foreign researchers.<sup>8</sup>

This has led to a state of flux for many area specialists over their status in academia more broadly. Some revel in their ability to bounce between disciplines because they are not specifically aligned to one. For others, the lack of a disciplinary home generates feelings of marginalization and being regarded as a second-class academic citizen. The disdain shown by some disciplines towards Area Studies means debates have at times been acrimonious. Chalmers Johnson (1997: 172), for example, in his blistering response to Bates' (1996) article on the division between Area Studies and political science, argued that Bates viewed Area Studies and political science scholars in a hierarchy: 'with the area specialist in the role of a gold miner digging away at the cliff face of a foreign culture, while the rational choice theorist is the master goldsmith who can turn this raw ore into beautiful things'.<sup>9</sup>

Alternatively, scholars from the humanities taking a more humanistic or critical approach have critiqued Area Studies for privileging the state as the unit of analysis. Furthermore, the regionalization of regions themselves have been considered problematic; for example, what are the implications of separating Latin from Central America or the Maghreb region from sub-Saharan Africa (Sil, 2010)? A further criticism launched at regional specialists by humanities scholars in particular has been the colonial and imperialist nature of it. Area

Studies was borne of empire (Ludden, 2015), and Edward Said's classic text *Orientalism* launched a postcolonial movement dedicated to ridding Area Studies of its colonial mentality (Said, 1994 [1978]). This movement raised questions about whether academics from the Global North should comment on the regions they studied, and, more importantly, generated critical analysis of how their research reproduced orientalist discourse and an exceptionalist view of a state or region outside of the Occident. Interestingly, research on the EU does not seem to have attracted this stigma within IR: there appears to be no negative connotation in IR attached to the occidental nature of research on Europe outside of critical theoretical approaches.<sup>10</sup>

In the same vein, Acharya (2006) notes how Area Studies conventions in North America are often heavily attended by humanities scholars who show limited appreciation for regional specialism and regional comparisons and dislike Area Studies scholars turning to disciplinary theory in relation to security and policy relevant work. Finding a balance between regional or local knowledge and broader IR theory has been made harder by Area Studies specialists such as Chalmers Johnson, who insisted that to break free of their culture, Area Studies researchers must spend long periods in the country of interest as well as learning language and immerse themselves in the culture (Johnson, 1997). Setting Area Studies up as a 'do or die' hardcore project, whereby anyone who has done less is not worthy, is not helpful to the Area Studies case as it generates a kind of 'you're in or you're out' mentality. This mindset often places generalists and specialists at loggerheads in reviews, whereby the area specialist will pick apart the empirics of an article or thesis to 'prove' the ignorance of the researcher's regional knowledge as a way of discrediting their argument.

Critiques on the value of a dialogue between Area Studies and IR/political science, then, have come both from within Area Studies themselves and from the disciplines such as the humanities and political science. Suffice to say that these concerns have eroded the credibility or even the legitimacy of Area Studies scholars in some departments. However, the argument that regional knowledge is less valuable because of its particular nature is the very issue this book seeks to ameliorate. If we are to understand what IR looks like in other parts of the world, we have to stop assuming that current IR theory is not ethnocentric, and that it is based on common sense and broadly applicable around the world. There is an urgent need to conduct more cross-regional research that tests existing theories, and, possibly more importantly, to build new theory in ways that provide rich data on IR in different parts of the world without relegating this knowledge to the



margins of the field.<sup>11</sup> How to do this, however, is complicated, not least because of the risks inherent in using the same data to generate and assess theories (Munck and Snyder, 2007).

Further complicating this debate is the emergence of the sub-field of comparative politics. Pye notes in the early years after the Second World War that to compensate for a perceived lack of rigour and a disciplinary home, many scholars migrated from Area Studies over to comparative politics. They recognized that to survive and publish in IR they would need to present as doubly skilled: regional experts needed to have language skills and local knowledge as well as rigorous methods (Pye, 1975). However, comparative politics scholars these days do not necessarily demonstrate deep regional knowledge or language skills – especially outside of the US doctoral system. Furthermore, they too have been accused of favouring middle-range theories, using soft versions of methodologies, applying case selection bias, generating and assessing theory from the same data, and harbouring a dislike of the ‘isms’ of IR (Finnemore and Sikkink, 2001; Basedau and Köllner, 2007; Munck and Snyder, 2007).

Debates on the contribution of Area Studies to IR have featured a conflation of Area Studies and comparative politics owing to the lack of clarity on its definition. Sil (2009: 27) notes Area Studies often encompasses ‘many distinct forms of nomothetic and idiographic scholarship – ranging from illustrations of theoretical models and case studies to historical narratives and ethnography – each reflecting distinctive epistemological principles’. Thus in several of the articles on the Area Studies versus the disciplines debate, comparative politics is conflated with Area Studies. In a series of articles on these debates, Katzenstein’s optimism about the increase in the number of students studying regions in US universities may fail to recognize that most are actually comparativists with limited in-depth knowledge of one country (Katzenstein, 2001, 2002). This in turn obscures the issue of the persistent use of positivist methodologies by comparativists that can fail to take account of context in many cases.<sup>12</sup>

Leaving the muddy waters of disaggregating comparative politics from Area Studies aside and refocusing on how to incorporate the particular into IR, it is worth noting that new attempts have been made more recently to identify new classes of scholarship that may assist in this process. Acharya (2006) divides this new classification into two main sub-types: disciplinary Area Studies and transnational Area Studies. The former category includes two further sub-types who work on regional issues: regionally oriented disciplinarians who come from a specific discipline and are interested in applying theory to a

specific region; and discipline-oriented regionalists who come from a background of a regional interest but apply disciplinary theory in the course of their work. The final cluster are transnational regionalists who focus on specific topics relevant to globalization and research that knowledge across multiple regions such as global health, migration, and so forth. Acharya (2006) notes that globalization has made regions more porous, making possible a more issue-based approach to studying international politics that simultaneously illustrates the particular while crossing regional boundaries. Although somewhat unwieldy, his categories draw out the differences in scholarly focus while providing scope for future work that is able to draw on the particular as well as the general. However, the emphasis on disciplines and transnationalism in these categories may not help to increase investment in local knowledge and in seeking alternative forms of IR outside of standard Western-centric theories, elements of research that many Area Studies scholars hold dear.

Basedau and Köllner (2007) have also attempted to marry the particular with the general by elucidating three categories of 'comparative Area Studies'. Their model comprises: intra-regional comparison; inter-regional comparison and cross-regional comparison. Rather than focusing on issue areas or disciplines, this approach focuses on what they term 'entities'. In this scenario, an intra-regional comparison would compare entities within a region, for example political parties in Southern Africa; an inter-regional comparison would compare different areas as units or entities, for example regional cooperation in Latin America and Africa; and a cross-regional comparison would involve comparing different entities across areas, for example resource-rich countries in the Middle East, Africa and Latin America.<sup>13</sup> To the extent that this approach synthesizes local, regional and global differences, it may signify a positive way forward for theorizing and including the particular when Globalizing IR.

Sil (2009) suggests increasing the number of cross-regional comparisons by using collaborations between regional and national experts to develop a more global perspective on IR. If done well, this approach would respond to earlier critiques of comparative politics research, particularly from the 1950s and 60s, which tended to study only Western concepts such as modernization theory and apply them to regions (Pye, 1975). Ultimately, then, the suggestion that Area Studies scholars come together to conduct cross-regional comparisons might be useful but this would need to be done using assumptions that do not automatically take Western conceptions in IR as their starting point.

To achieve this, research that mines local knowledge will take more than case study comparison alone. As noted by Acharya (2014) and others, to truly tap into alternative conceptions of governance, institutions, and interstate and community relations, Globalizing IR will need to draw on the work of Area Studies scholars who can explicate local concepts and how these inform thinking in IR (Acharya, 2014). Hence the Globalizing IR project is an opportunity to draw on the embeddedness of area specialists to help build new theory and further shape our conception of what IR looks like in non-Western states.

A great deal of debate about the contribution and value of area specific knowledge has rested on the development of ideas about the production of knowledge in IR. In order to truly understand how both regional specialism and methodological hegemony inhibit the study of IR, and more particularly Globalizing IR, the following section unpacks the assumptions underlying predominant research methods and offers alternative methodological approaches that might be better suited to research within the Globalizing IR project. The aim here is to clarify the challenges faced by students and academics in regard to using alternative methods and to make concrete suggestions as to how these challenges might be overcome.

## How the scientific method limits Globalizing IR

In the television show *The Big Bang Theory*,<sup>14</sup> Sheldon, a theoretical physicist, is speculating on how he can win grant money to test his highly abstract theories on what constitutes the universe. He turns to Leonard, an experimental physicist, to ask for suggestions on the experiments he might use to put together a grant proposal that will fund his research. Leonard thinks for a moment and then replies that because Sheldon's ideas are so abstract he can't think of any way to test them. Sheldon then asks Leonard the logical question of why he keeps his job as an experimental physicist if he can't think of any experiments.

Sheldon's point is one that often bothers students. In IR they are taught about the different grand theories that purport to explain how the world works; however, when it comes to testing these ideas, students are informed that using 'the scientific method' means finding testable hypotheses that can be falsified. For most grand theory, no such hypothesis is explicit enough to be tested. As a result, students are encouraged to find or generate middle-range theories that are operationalizable and therefore testable and falsifiable.

Two points about this need to be made before a deeper discussion of this issue: first, it is possible to find both articles and informal complaints in IR that speculate about the death of grand theory and ask why we are only seeing the development and testing of middle-range theories. I argue that this can be located in the methodological debates that have plagued IR (and comparative politics) since the 1950s. I contend that these debates have been won (for the most part) by the neopositivists.<sup>15</sup> This leads me to my second point, which is that by limiting the production of knowledge to testable and largely observable (or implicitly observable) variables/causal mechanisms, we greatly limit the scope of what is regarded as researchable in IR. This has direct impact on what we examine in IR, where and how we do that research, and which research contributes to the ethnocentric generalization problem highlighted in this section.

There is a further problem attached to this. Not only does the ‘scientific method’ constrain us as scholars on what is testable and therefore considered researchable, it also excludes a pluralist conception of the production of knowledge. As Jackson (2016) notes, IR scholars often misconceive methods as a dichotomy: a battle between positivists versus interpretivists.<sup>16</sup> This leads to what he terms as ‘the dialogue of the deaf’ (Jackson, 2016: 124), whereby both groups challenge the legitimacy of the others’ inquiry. In doing so, neither group fully understands the scope of what is possible to research in IR and the subtle differences that exist between different types of research.

Jackson conceives of a  $2 \times 2$  table that disaggregates IR research into four typologies capturing the philosophical ontological assumptions underlying each one. While there is not the space to unpack this model in detail here, the most important takeaway from Jackson’s work is that there is a lack of intellectual honesty in the way IR is taught academically. Students are often taught that neopositivism is ‘the scientific method’ and moreover the only one that is valid and legitimate. As a lecturer, I find this frequently trips up students when trying to develop their own research projects. Many students are drawn to the ‘critical literature’ encompassing, for example, securitization, feminist and postcolonial theorizing – many of the topics that Globalizing IR engages with. They then attempt to marry (often at the insistence of their supervisors) these theories with neopositivist methodology, more often than not with fairly disastrous consequences. What is most unfair is that by insisting on the use of neopositivist methods, academics are imposing a philosophical-ontological hegemony on their students but without making that

explicit. This has direct consequences on what students study, the theory they preference and how they research that theory.

Arguably, one of the most limiting aspects of neopositivist methods is the sacrifice of empirical detail for method. Cross-case comparisons often use Millian methods of similarity and difference between the units of analysis to justify case selection, possibly triggering methodological selection bias.<sup>17</sup> The point here is that the rich detail found in Area Studies is often neglected. Even when within-case methods are employed, they are often used to explain a particular theoretical problem (which often suffers from the ethnocentric issue noted previously) but often not with the aim of showing how the specific context of the state or region plays out.<sup>18</sup> Rather, once the hypotheses have been identified, the search is on to find evidence of their existence or lack thereof, not to fully explicate the surrounding context because causality is not imagined to lie in context. Ultimately, then, the goal of this kind of research is to make law-like generalizations that fit with IR theory, not to identify the particular characteristics of regions or states. As Sil (2009: 27) notes: ‘... the very act of treating one’s object of empirical analysis as a “case” and one’s observations as “data points” suggests a commitment to a nomothetic endeavour ultimately geared towards identifying or confirming general laws or law-like regularities’.

In contrast, Area Studies research usually requires the use of what we might term more monist approaches or inductive research.<sup>19</sup> It uses methods that require an element of ethnography, appreciation of culture and the unacknowledged practices that formulate and constitute knowledge in the state or region of interest. All of which is to say that the question here is how do we reconcile the neopositivist–postpositivist dichotomy, and find ways forward in Globalizing IR that can help to build the particular and regional voices into our research?

Compounding the marginalization of the particular in IR is that some academics will go so far as to dissuade their students from embarking on a critical path. Often this is because they do not feel comfortable supervising theses that fall outside the range of neopositivist methods that infer causation from covariation or constant conjunction. In part, however, this is due to a lack of clarity on what post-positivist methods are and how they should be deployed (Jackson, 2016). I find that students at MA level, in particular, often find it hard to identify a suitable method with which to research critical theory.<sup>20</sup> This is often because the authors of this kind of literature are not explicit enough themselves about how they reached their conclusions.<sup>21</sup> This kind of approach is what I term a ‘you know it

when you see it' paradigm, which in my view is deserving of some of the critiques levelled at it.

When we consider then how students can conduct research in the emerging field of Globalizing IR and incorporate more regional voices into their work, we come across the challenge of methodology as much as we do Area Studies integration into IR theory. While Area Studies is a broad discipline, much of the research is ideographic, empirical, analytic, based on single case studies and ethnographic. This is not to say that the use of ethnography is not a legitimate research method, nor is it to argue that the single case study should be abandoned. As we know, some of the most influential theories in political science emerged from single case studies (Dahl, 1961; Allison, 1971), and some of the most interesting research on non-Western political systems has come from interpretative studies (for example, Geertz, 1981; Schubert, 2018). However, this scholarship remains outside the mainstream of IR, and so scholars undertaking this kind of work often have to work harder to justify their use of alternative methods.

I argue here that, first and foremost, it is essential that we ensure students receive a holistic view of the methods of knowledge production in IR that is pluralist and makes clear the philosophical-ontological assumptions of each approach. This would be an excellent start in helping students find their academic voice. Presenting this information early on would help avoid a great deal of the confusion students face and would, I believe, free students up to explore alternative conceptualizations of the world that are not constantly in tension with mainstream neopositivist research methodology.

Second, I wish to suggest pathways to knowledge production in Globalizing IR that can act as a bridge between political science methods and Area Studies. Three research approaches are emerging as revitalized research techniques in political science: analyticism (Jackson, 2016), comparative historical methods and cross-regional comparisons (Lange, 2013), and some forms of process tracing (in particular Beach and Pedersen, 2013). All three emphasize the role of pragmatism and an instrumental use of theory to advance detailed, in-context research. In doing so, they enable scholars or students to free themselves from the burden of the bare bones of cross-case comparison using covariation, and embrace the richness of detail to be found in specific cases. Why will this be of benefit to Globalizing IR? Because it will enable the discipline to engage more deeply at the regional level, to seek and enjoy difference rather than parsing over it and hence build theory that is more globally representative, and yes I dare say nuanced.

What remains now is to provide an overview of how each method might be usefully employed to conduct research in Globalizing IR that takes greater account of regional voices. All three methods outlined here have been selected because they share the goal of seeking variation rather than minimizing regional differences to facilitate explanatory research that draws on Millean methods of similarity or difference.<sup>22</sup> Owing to the lack of material currently available on analyticism, this methodology is explicated in much more detail than the other two methods, as detailed texts on how to undertake research using the latter are readily available. This section is intended to help guide and inspire students wishing to explore alternative ways to conduct research in Globalizing IR.

## Analyticism

To return to my earlier anecdote about *The Big Bang Theory* and the problem of the ‘untestable’ abstract theory that so haunts Sheldon, I argue that there is at least one way for political scientists to simultaneously test grand theory across regions while at the same time building new theory or ‘ideal types’ of how that theory plays out in different regions.

The analytic method of analysis as described by Jackson,<sup>23</sup> termed here analyticism, argues that the aim of theory should not be to reveal generalizing ‘rules’, which is a significant departure from the neopositivist position. Analyticism believes theory orients our empirical knowledge but cannot produce law-like generalizations. Instead ‘ideal types’, heavily based on Weber’s conception of them (Lebow, 2017), are used to place facts into a more comprehensible form. This deliberate oversimplification does not suit falsification; it is used to simplify in order to be useful. This methodology is underpinned by an assumption of the need to be pragmatic about the fact that the world does not always work according to universal theories and that outcomes often occur due to specific events. One of the main tenets of analyticism is that we learn about the world through practical engagement with it as a part of it; for example, knowledge production occurs through practice, and therefore the mind-world dualism espoused by neopositivists is a false dichotomy.

The philosophical ontology underlying this method is what Jackson (2016) terms ‘monist-phenomenalism’. This means that the mind-world dualism that exists in neopositivism and the Cartesian anxiety that goes with it – namely, how can we know that we know the ‘truth’ about the world? – is side-stepped by acknowledging the values that



underlie our knowledge are *a priori* and transcendental; hence use of the word ‘monist’. The phenomenism label refers to the study of ‘facts’; real-world things that are taken to be real as per our understanding of the world currently. This is because value-laden rules within a specific case can be viewed as being separate from our interpretation of them. The assumption is that we might learn about something through practice which might be a subjective thing, but in the process we create entities that are intersubjective, that is, the rules of a game. This means we can codify evidence separate from our own experience/values in a scientific way. Rules are conceptualized in this methodology as intersubjective in that if they are changed this can happen only when these changes are agreed by the masses. As Jackson notes, ‘it is possible to generate valid knowledge about the rules of a game without thereby reducing the game to the subjective beliefs of its players’ (Jackson, 2016: 134). This approach was also used by Clifford Geertz, despite being an anthropologist by training (see, for example, Geertz, 2000).

Unlike reflexivists, analyticists believe that facts can be distinct from our values; however, we need to acknowledge our values prior to examining a concept (see Figure 3.1). This means in part we are value-laden, and in part we are ‘scientific’. The ultimate premise is that we do not ascribe to being able to find some absolute truth or generalizable covering laws, or seek the falsifiability of laws in order to be considered scientific. This means causality is treated differently than by neopositivists as analyticism does not rely on covariation or constant conjunction.

Instead, analyticism argues that we can use a single case study that we compare to an ideal type. As such, this method seeks out the differences between ideal types and the real world. In turn, this can generate changes to the ideal type, or even the creation of a new ideal type. The use of this approach means it is possible to see the limits and possibilities of what can and does occur. This makes it possible to understand the specific conditions of the case, as much as it does test grand theories.

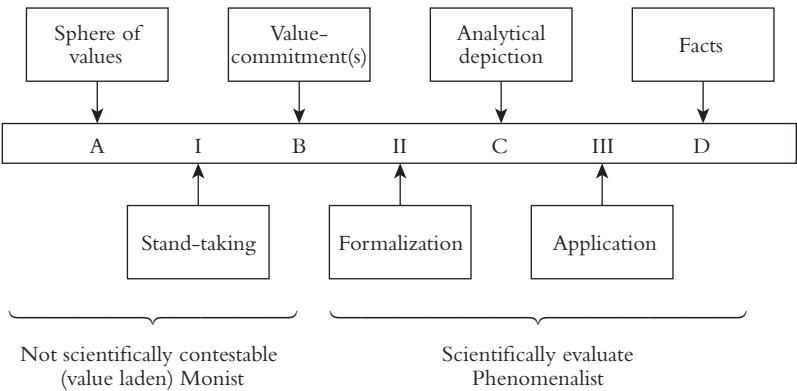
An ideal-typical analytical depiction produces not a representation of any actual situation, but a model of it, using categories and terms that a scholar has derived from a set of value-commitments. The distinguishing characteristic of a model is that it is neither true nor false, but is instead an instrumentally useful object that might – or might not! – express some of the relevant features of the object or process under investigation. (Jackson, 2016: 146–7)



This is not to say that multiple cases cannot provide additional insight into an ideal type; they can and have been used to do so (Lange, 2013). But the aim is not to produce some kind of formal case comparison, under a set of scoping conditions; nor is it to produce a falsifiable hypothesis with the aim of generating a general causal law. Rather the aim is to show why in specific cases, things worked out the way they did or did not, taking into account the context and more importantly, accounting for differences between different contexts.

*Method of application*

**Figure 3.1:** The Weberian Procedure of Ideal Typification



Source: Model taken from Jackson (2016: 145) and amended by Adcock (2019) (unpublished)

*Method of analysis in analyticism*

To give more shape to the analytic approach, this section provides a more detailed description of how it might be applied in practice. The actual method used in this methodology is to look for three types of causation using what Jackson (2016: 163) calls ‘the procedure of disciplined imagination’.

These causation types are described as follows:

- (1) Adequately causal (part of an ideal-typically specified causal configuration without which we cannot imagine the outcome having occurred);
- (2) Coincidentally causal (we cannot imagine the outcome having occurred without it, but it is not part of a systematic ideal-type); or
- (3) Not causal, or incidental (we can imagine the outcome having

occurred regardless of whether the factor was involved).  
(Jackson, 2016: 163)

In order to render the method as rigorous as possible, the analytic method utilizes the counterfactual argument to seek alternative explanation for the empirical findings. Counterfactuals are already heavily used in positivist methods and therefore should not present too much of a problem for any researcher (Fearon, 1991). However, Jackson's definition of counterfactuals, described as 'informed judgements about alternative causal pathways' (Jackson, 2016: 149), takes account of context.

This method shows us how pragmatism and the use of ideal types could help the Globalizing IR scholar engage more deeply with different regions, but unlike using standard comparative politics methods, she is freed from the burden of trying to show covariation with other cases or testing general laws. The use of ideal types enables the Globalizing IR scholar to test grand theories in the context of regions but more importantly to build alternative ideal types that may better explain regional dynamics in specific cases while potentially creating useful archetypes of alternative orders and new ways of theorizing about IR.

However, of note is that the ideal types developed in this method should attempt to create models that do not always take as their starting point Western conceptions of what is normal or common sense. Returning to the models of comparison described earlier, establishing an ideal type based on non-Western precepts and evaluating in different regions would help to broaden and deepen our conception of Global IR. This again is where scholars of and from the Global South can and should make a huge contribution.

## **Comparative historical methods**

For scholars still wishing to test or develop middle-range theories, the remaining two methods will be of value as both embrace the role of detail in building theory. While historical case study methods have been in the field for some time (for example, Tilly, 1978; Skocpol, 1979; Ertman, 1997), of note is that there has been a recent historical turn in IR, and IR scholars who might not position themselves as Globalizing IR scholars per se have turned to history to develop alternative conceptions of global order. For example, Jason Sharman has been heavily instrumental in this project, most recently arguing that our understanding of why the West became dominant globally is based

on misapprehension of the local regional systems (Sharman, 2019). Phillips and Sharman (2015) have also written a history of the IR of the Indian Ocean to show how systems of trade functioned well before the rise of the West. This kind of work is new to mainstream IR, having previously been located in history, Area Studies and anthropology.

While historical research has formed a core component of IR theory and made a significant contribution, it has often done so not by falsifying testable hypotheses but by tracing the pattern of events and drawing conclusions that highlight why something occurred in one place but not in another. In developing Globalizing IR, the use of historical research that produces these alternative narratives will be essential for furthering a non-ethnocentric version of global history. Specifically, the most useful contribution historical comparative methods brings to IR is what Lange calls ‘the seeking of difference’, the value of which he describes thus: ‘Such difference-oriented comparisons are valuable because they highlight the great diversity and complexity of the social world and show how social phenomena are commonly unique. They therefore serve as a corrective to comparative works that may seek to stretch generalizations to the extreme’ (Lange, 2013: 16).

Like Area Studies, comparative historical methods is a broad church, so I consider some methods more useful than others,<sup>24</sup> specifically approaches that draw on within-case methods such as causal ordering (see, for example, Skocpol, 1979), asymmetric causal processes (see Lieberman, 1985; Weber, 2001 [1905]), period effects (see, for example, Ertman, 1997) and causal narrative examining inter-case relationships, that is, diffusion across regions (for a full explication of this method, see, for example, Wallerstein, 1974 [and subsequent volumes 1980, 1989, 2011]; Wolf, 1982; Lange, 2013: 79–84). All these methods reflect on the role of time and context to explain change and momentum. Possible cross-case methods include narrative comparison that combines nomothetic and ideographic insight and the ideal-type methodology outlined by Lange (2013), which bears a close relationship to the analytic method outlined earlier in this chapter (see Lange, 2013: 105–7 for a full explication of this method).

## Process tracing

Process tracing is possibly one of the most well-known, least well-understood and most poorly executed small-n method in political science. This in part is because there are many different conceptions of what process tracing is, and what good process tracing should look like

(varying views include Gerring, 2007; Collier, 2011; Mahoney, 2012; Rohlfing, 2012). Neopositivist conceptions of process tracing use it for within-case analysis. For research in Globalizing IR, Beach and Pederson's approach to process tracing comes the closest to embracing the pragmatic use of theory outlined here and the seeking of variation, as it argues that process tracing should only ever be used for analysis of single case studies. It is beyond the scope of this chapter to provide an outline of this method in detail, not least because a detailed text on this type of process tracing already exists (Beach and Pedersen, 2013). Suffice to say, Globalizing IR researchers using a single case study who wish to theory build or explain the outcome of a given case may find this method useful.

### **The quantitative versus qualitative debate**

One of the most refreshing aspects of Jackson's interrogation of the philosophical ontology of methodologies in IR is the idea that once we are clear on what the philosophical-ontological assumptions of our work are, the issue of epistemology becomes less of a concern. However, it is worth briefly mentioning why I highlight more qualitative than quantitative methods here. First, because we are still suffering from a lack of quality empirical research into the IR of other regions and their contribution to global order, I choose to prioritize qualitative over quantitative methods. Second, all statistical analyses use neopositivist assumptions and fall victim to the problems described earlier, not least the urge to generate general laws and use constant conjunction to prove these laws. As such, while I believe the use of quantitative methods for instrumental purposes could be a useful nested addition within Globalizing IR research, designing a study for the sole purpose of conducting quantitative research would necessarily mean the researcher is working from a set of assumptions that are neopositivist. As such, conducting research that engages with culture, practice and context is unlikely to be found in a quantitative research project. Only by building up a clear picture of how the world works from the perspective of other regions will we be able to develop theory that includes multiple voices that we might later consider testing.

### **The language debate**

To return to my initial conundrum at the beginning of this chapter, should more people be learning the language of the region they choose to study? I believe that learning the language of the region

you are dedicated to researching in detail is useful; however, the caveats I outlined earlier continue to apply, plus several more. The first is that students need to consider the challenge of actually learning a language alongside conducting a significant research project. Second, expectation management is key. It is one thing to be able to converse casually in a new language, yet another to be able to read written sources with the necessary speed, understand policy documents or engage with the academic literature in a foreign language. Finally, cultural references are buried deeply in language and as such are often only available to native speakers or those who have been embedded in the culture for many years.

Going forward, I would like to think that Globalizing IR will attract more native speakers from non-Anglosphere states and regions who already possess the necessary language skills to use primary and secondary sources in non-English language sources.

Ultimately, I am of the view that for practical reasons alone, when it comes to cross-regional research, language learning cannot always be considered a necessity. As noted previously, many instructive and illuminating historical studies have been conducted without knowledge of local languages. However, more collaboration with local academics and practitioners is one way to exercise due diligence on the validity of research outside the researcher's own cultural sphere. This means curbing the temptation to fly in to a country, obtain a handful of elite interviews and fly out, and instead carefully balance the outsider-insider perspective to generate a full understanding of the intersubjective understandings of the concept under investigation.

## Conclusion

This chapter has argued that IR sacrifices context in the pursuit of law-like universal theories. This pursuit of 'the scientific method', I have argued, has generated ethnocentric theory as North American and European researchers have drawn on easily accessible data from their own culture that they presume can be generalized across the globe. This has in turn led to a rejection of the particular and inhibited the development of alternative approaches to interpreting global order.

To get beyond this problem, research in Globalizing IR must be able to combine ideographic with nomothetic insights and adopt a pragmatic use of theory in order to dig into the context with an open mind to uncover alternative conceptions of international relations. This endeavour is far from simple, but it is hoped the research methods suggested here help to illuminate a path to knowledge production that

facilitates a broadening of IR theory that is more inclusive producing a more Globalizing IR where coexistence of the particular and general is possible.

## Notes

- <sup>1</sup> Anyone familiar with the Middle East will know it is quite impossible to understand the politics of Lebanon without a thorough understanding of regional dynamics.
- <sup>2</sup> See Chapter 1 of this book for more detail.
- <sup>3</sup> In this section, I refer to political science and IR interchangeably for reasons of convenience. In US scholarship, IR is viewed as a sub-field of political science and much of the literature sourced here draws on US sources.
- <sup>4</sup> Furthermore, comparative politics appears to also have a bias towards studying 'the West' at the expense of the rest. It was noted in 2007 that publications in comparative politics journals featured a heavy bias towards the study of Western Europe (41%) compared with other regions (Munck and Snyder, 2007).
- <sup>5</sup> In 1947, the Foreign Office commissioned Lord Scarborough to conduct a review, which recommended special grants be awarded for the study of Slavonic and Oriental studies. In 1959, the University Grants Committee recommended British universities focus more on current events in foreign areas and produce more area specialists in Asia, Russia, Africa and Eastern Europe (see Pye, 1975: 13).
- <sup>6</sup> However, a cautionary note here is that drawing on regional expertise on the Middle East solely for the purposes of predicting terror threats is not the kind of opening up of area studies expertise that I endorse as it essentializes a hypothesis that links Islamic fundamentalism closely with the Arab World. Rather I encourage a broad engagement with a regional expertise, not one wholly based on Western security concerns.
- <sup>7</sup> Although, as Jung notes, Middle East experts also failed to predict the Arab Spring (see Jung, 2014).
- <sup>8</sup> The safety of conducting fieldwork in situ is increasingly becoming a problem for scholars wishing to research in some states (see Grimm et al, 2020).
- <sup>9</sup> Perhaps ironically, despite a turn to rational choice in comparative politics, this sub-field of IR has been similarly dismissed by some IR scholars who regard the knowledge produced as epiphenomenal and levy charges of unscientific methods against this body of work (see later in this chapter).
- <sup>10</sup> While this discussion has occurred in history, (see, for example, Chakrabaty, 2009), it has not been explicitly discussed in IR or the EU studies literature.
- <sup>11</sup> In that vein, I would also strongly advocate that the same goes for feminist perspectives on IR that remain underrepresented in mainstream IR.
- <sup>12</sup> I discuss the issue of methodology later.
- <sup>13</sup> For a full discussion of this model, see Basedau and Köllner (2007: 110–12).
- <sup>14</sup> *The Big Bang Theory*, Warner Bros, 2007–19. Creators Chuck Lorre and Bill Prady. Directed by Mark Cendrowski.
- <sup>15</sup> In brief, neopositivism is underpinned by the notion of mind–world separation and the existence of an objective reality that can be researched by measuring observable phenomena. For a full explanation, see Jackson (2016, chapter 3).
- <sup>16</sup> Interpretivists here can be taken to include (but are not limited to) many critical theoretical research methods that embrace bottom-up, interpretative approaches (see Jackson, 2016, chapter 6).

- 17 Of note is that quantitative work often makes similarly subjective decisions from conceptualizing variables through to the choice of post-hoc tests and the classification of outliers.
- 18 And when conducted in comparative politics, as noted previously in-country knowledge may be quite limited.
- 19 As opposed to the mind-world dualism that neo-positivism embraces (see Jackson, 2016).
- 20 A student of mine spent days trying to find a clear outline of what a good genealogy should look like, with no success in both the political science and historical literatures.
- 21 Obviously, there is a difference between normative theorizing and the conduct of inquiry on a research problem. I stress here that I am speaking of the latter.
- 22 This method relies on causal inference being derived from the independent or the dependent variables and not the context.
- 23 This material is also drawn from a series of lectures given by Robert Adcock at the European Consortium of Political Research summer school, Budapest, Hungary, 2–5 August 2019.
- 24 Other conceptions such as path dependence and historical institutionalism I consider less useful as they contain a more neopositivist bent towards generalization and nomothetic explanation.

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