Comparative Case Studies: An Innovative Approach

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Abstract

What is a case study and what is it good for? In this article, we argue for a new approach—the comparative case study approach—that attends simultaneously to macro, meso, and micro dimensions of case-based research. The approach engages two logics of comparison: first, the more common compare and contrast; and second, a "tracing across" sites or scales. As we explicate our approach, we also contrast it to traditional case study research. We contend that new approaches are necessitated by conceptual shifts in the social sciences, specifically in relation to culture, context, space, place, and comparison itself. We propose that comparative case studies should attend to three axes: horizontal, vertical, and transversal comparison. We conclude by arguing that this revision has the potential to strengthen and enhance case study research in Comparative and International Education, clarifying the unique contributions of qualitative research.

Keywords: case study; research methods; comparison; context

Introduction

Case study methodology is widely used across multiple disciplines and fields. But what is a case, and what is a case study? In his introduction to the fascinating edited volume called "What Is a Case?", Charles Ragin argued that scholars use the word case "with relatively little consideration of the theories and metatheories embedded in these terms or in the methods that use cases" (1992, p. 1). Ragin posed a series of provocative questions: What is the difference between case-driven studies and variable-driven case studies? Is a case study constituted by empirical units (e.g., a state, or a hospital) or theoretical constructs? Finally, are cases discovered or developed over the course of conducting research, or are they "general and relatively external to conduct of research" (p. 8)? The

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answer to each of these questions has implications for how a researcher thinks about and uses case studies.

In this article, we argue for a new approach—the comparative case study approach (CCS)—that attends simultaneously to macro, meso, and micro dimensions of case-based research. The approach engages two logics of comparison: first, the more common compare and contrast logic; and second, a "tracing across" sites or scales. We consider the comparative case study approach to be a *heuristic.* Derived from a Greek word that means "to discover," heuristic can be defined as a method that comes from experience and aids in the process of discovery or problem-solving. It is not a recipe or a set of rules. Rather, the CCS approach is, first and foremost, a reminder of *how much we might achieve through comparison.* Following Ragin's suggestion to conceptualize a case using theoretical constructs, we focus on tracing the *phenomenon of interest* in a study across sites and scales. By phenomenon, we mean the central issue or idea of concern to us as researchers. The term phenomenon directs us, first, toward something like a policy or a program and then, as it comes into focus, it leads us to ask what is unexpected about it, and why and to whom does it matter. In explaining the comparative case study approach, we contrast it to dominant, traditional approaches to case study research. We contend that new approaches are necessitated by conceptual shifts in the social sciences, specifically in relation to culture, context, space, place, and comparison itself (for a fuller treatment of these themes, see Bartlett & Vavrus, 2017).

The logics of comparison

In the multidisciplinary field of comparative education, as in other fields, comparison has come to mean different things to different people. For many years, there was an underlying assumption that comparison must be cross-national. This trend dates from the 1960s and 1970s, when scholars like Harold Noah and Max Eckstein sought to move the field away from more historically-informed methods and toward a hypothesis-driven social science, as reflected in their book *Toward a Science of Comparative Education* (1969). As others have noted, this tendency persists today in the field of comparative education, if perhaps unconsciously (Philips & Schweisfurth, 2014).

However, contemporary comparative education scholars have vigorously defended the value of other types of comparison. Steiner-Khamsi warned educational policy scholars to avoid methodological nationalism, which is "the trap of first establishing national boundaries, only to demonstrate afterward that these boundaries have indeed been transcended. [Policy] reforms do not have a home base, a territory, or a nationality and therefore do not 'belong' to a particular educational system" (2010, p. 327). Philips and Schweisfurth also insisted that the state is not sufficiently coherent to serve as an exemplary unit of comparison. They contended that "intranational investigation has been relatively neglected," and "comparativists should seek out units of analysis that are intrinsically appropriate to the task at hand" (2014, p. 115).

Though we agree with this critique of defining comparative studies by nation-states, and we applaud the move to compare at other levels, we wish to push the critique even further, to reconsider "units of analysis." This term references a variable-oriented notion of comparison. It assumes that a study identifies (or even bounds) specific units—be they institutions or people, or both—and holds them constant while varying other factors or variables to test hypotheses. Unit of analysis isolates the entity being analyzed, the *what* or *who* that is being studied, and typically refers to individuals, groups, or organizations (Babbie, 2012). It separates these units from the things around it, rather than looking at connections. It fundamentally adheres to a positivist logic that is consistent with some, but not all, varieties of qualitative research (Guba & Lincoln, 1994). We think of this as the traditional "compare and contrast" logic of comparison.

But there is another logic worth considering—one that instead traces across individuals, groups, sites, or states. Much contemporary anthropological research seeks to engage in multi-sited ethnography, which exemplifies this logic of tracing. Multi-sited ethnography does not contrast places assumed to be unrelated; instead, it looks at linkages across place, space, and time (Marcus, 1995, 1998; Falzon, 2009; see also Bartlett & Vavrus, 2017). Allied efforts seek to look at how processes unfold, often influenced by actors and events over time in different locations and at different scales. Such an optique requires a multi-sited, multi-scalar approach. This reflection exemplifies the need for attention to the vertical, horizontal, and especially the transversal elements of the study. It also requires a processual, iterative rethinking of case studies.

This "tracing" logic can reveal important and surprising analyses. For example, adopting a processual approach, Carney (2009) creatively compared the educational "policyscape" of three countries (Denmark, Nepal, and China) in three different domains (higher education, general education, non-university-based teacher education). Carney demonstrated how a policyscape binds these putatively dissimilar countries together as they reform their education systems in ways that evidence strikingly similar "visions, values, and ideology" (2009, p. 79). He argued that global flows of policies have displaced the state and drawn in different international organizations and actors (2012). In such an approach, comparison may be engaged to demonstrate how strikingly dissimilar countries and social or educational challenges might be addressed with similar policies.

A quick visual example of this logic of comparison may help. If we picture for a moment a high-rise building that houses the staff of a company, one could conduct a study that compares the way that lower-level workers on the first few floors and senior management on the upper floors interpret and enact the company's mission on corporate social responsibility. Such a study would literally be a vertical comparison and might generate insights into how gender, class, race, and age influence the interpretation of social responsibility. This is the usual compare/contrast logic, and it has much to offer. However, a comparison of pre-determined stratified levels (e.g., the administrative staff on the 2nd floor; the regional managers on the 12th) does not allow for the study of interactions among the employees with different positions in the company or for informal flows of

knowledge from one floor in the building to another that one cannot necessarily anticipate before launching a research project. If we were, instead, to trace across the company to study the process by which the mission statement came into being, we might find that it was through interactions among people on different floors as well as at the company's offices in other states or countries. This tracing cannot be done without regard to relations of power, however, which demands that we consider whether there was consultation in the process of statement development and who was or was not consulted; how the mission statement was appropriated in different sites; and how it was implemented by people with different degrees of decisionmaking power across the levels, sometimes in consultation with each other. If we were to carry out a study that traced a policy across these different scales, then we would have a more dynamic study than one that compared and contrasted pre-determined units of analysis. We would be acknowledging that social relations are complex and extend beyond the confines of any pre-defined grouping or level; that alliances and factions within a network are not stable but neither are they random or divorced from broader relations of power; and that authoritative texts like mission statements and national policy draw on knowledge from multiple sources that circulate globally.

Thus, we argue that comparative case studies need to consider two different logics of comparison. The first may well identify specific units of analysis and compare and contrast them. The second, processual logic seeks to *trace across* individuals, groups, sites, and time periods. Different questions are likely better suited to one logic than another, but both might be considered. Further, we argue that the second logic has been under-utilized in the field of Comparative and International Education (though see Bray et al., 2014 on holistic methodology).

Process-oriented approaches and the comparative case study heuristic

The comparative case study heuristic adopts what Maxwell called a *process orientation*. Process approaches "tend to see the world in terms of people, situations, events, and the processes that connect these; explanation is based on an analysis of how some situations and events influence others" (2013, p. 29). They "tend to ask *how x* plays a role in causing *y,* what the *process* is that connects x and y" (2013, p. 31).

Thus, the process-oriented comparison inherent to our notion of comparative case studies insists on an emergent design, one hallmark of qualitative research. As Becker (2009) wrote, qualitative researchers:

> don't fully specify methods, theory, or data when they begin their research. They start out with ideas, orienting perspectives, or even specific hypotheses, but once they begin, they investigate new leads; apply useful theoretical ideas to the (sometimes unexpected) evidence they gather; and, in other ways, conduct a systematic and rigorous scientific investigation. Each interview and each day's observations produce ideas tested against relevant data. Not fully pre-specifying these ideas and procedures, as well as being ready to change them when their findings require it, are not flaws, but rather two of the great strengths of qualitative research. (Becker, 2009, p. 548)

Because qualitative studies are emergent, researchers have to make explicit what Heath and Street (2008, p. 56) called "decision rules," or decisions about how to focus or expand the study. These should be noted in one's fieldnotes, and could be reproduced as a sort of "audit trail" (e.g., Lincoln & Guba, 1985).

The need for an emergent design is in conflict with the constant admonition in the traditional case study literature to "bound" the case. Merriam (1998) frames the case as a "bounded system":

> The single most defining characteristic of case study research lies in delimiting the object of study, the case. Smith's (1978) notion of the case as a *bounded system* comes closest to my understanding of what defines this type of research…. [T]he case is a thing, a single entity, a unit around which there are boundaries…. If the phenomenon you are interested in studying is not intrinsically bounded, it is not a case. (Merriam, 1998, p. 27)

Merriam's view appears to be shaped by Miles and Huberman's (1994) understanding of "the case as a phenomenon of some sort occurring in a bounded context" (cited in Merriam, 1998, p. 27). This sort of systems thinking, within an arbitrarily defined boundary, is inconsistent with the emergent design required of good qualitative research. Yet the notion of cases as "bounded" is widespread. For example, Robert Yin, whose influential book on case methods is now in its fifth edition (2014), describes "bounding the case" as an essential step in the study. He wrote:

> Once the general definition of the case has been established, other clarifications – sometimes called bounding the case – become important. If the unit of analysis is a small group, for instance, the persons to be included within the group must be distinguished from those who were outside of it…. Similarly if the case is about the local services and a specific geographic area, you need to decide which services to cover…. [Clarify the boundaries of your case] with regard to the time covered by the case study; the relevant social group, organization, or geographic area; the type of evidence to be collected; and the priorities for data collection and analysis. (Yin, 2011, pp. 33-34)

To be fair, Yin did acknowledge that the research design might change over time; however, his emphasis on bounding is marked. Yin is not alone in his concern with bounding the case. Case study methodologist Creswell (2013) also suggested bounding by time and activity, and Miles and Huberman (1994) recommended bounding by definition and context. Each insists that bounding the case maintains a reasonable and feasible scope for the study. Moreover, Stake (2003) adopted a functionalist notion of cases that relies on the sense of a case as a closed, bounded "system." He wrote that the case is a "bounded system" with:

> working parts; it is purposive; it often has a self. It is an integrated system…. Its behavior is patterned. Coherence and sequence are prominent. It is common to recognize that certain features are within the system, within the boundaries of the case, and other features outside… are significant as context. (Stake, 2003, p. 135)

We argue against this functionalist vision of the case because it imposes a sense of a case as a system, and this risks foreclosing analysis of how other actors and entities affect the phenomenon of central interest in the case study.

This focus on bounding is distinct from our spatially- and relationally-informed understanding of context and our processual notion of culture, and we find this notion of bounding the case from the outset to be problematic. Most importantly, it aligns more with a neo-positivist design, which predefines variables and hypothesizes relationships, than it does with the iterative, processual designs more common in qualitative work (see also Flyvberg, 2011). We contend that boundaries are not found; they are made by social actors, including by researchers, whose demarcations can often seem quite arbitrary and can have the effect of sealing off the case hermetically from other places, times, and influences. With our more process-oriented understanding in mind, we should be aware that some studies may be more pre-structured than others; the degree of flexibility will depend on the study's aims, the researcher's motivations, skills, and interests, and the available time and resources, among other things.

The CCS approach does not start with a bounded case, as do more traditional approaches. We argue that it is essential to divorce the phenomenon of interest from the context in order to gain analytical purchase. For example, rather than thinking of School A as the case, we could think of a policy promoting learner-centered pedagogy or a new standardized assessment package as the phenomenon we seek to understand, and the case is formed by tracing across sites and scales to understand how the phenomenon came into being, how it has been appropriated by different actors, and how it has been transformed in practice. At the same time, even while including multiple sites and cases, comparative case studies seek not to flatten the cases by ignoring valuable contextual information, such as historical circumstances, or imposing concepts or categories taken from one site onto another (van der Veer, 2016). The CCS approach seeks to disrupt dichotomies, static categories, and taken-for-granted notions of what is going on (Heath & Street, 2008).

Instead of this a priori bounding of the case, the CCS heuristic features an iterative and contingent tracing of relevant actors—both human and non-human—to explore the historical and contemporary processes that have produced *a sense of* shared place, purpose, or identity with regard to the central phenomenon. For example, a study might compare how non-governmental organizations (NGOs) supporting refugee teacher education are operating in a particular region of a country and also contrast their interpretations of a refugee education policy to those of the NGO directors in the capital or to the NGOs' donors in another country. This is a quite different conceptualization of replication design as promoted by Yin and the need for tightly-bounded units of analysis that it implies.

Another feature of the CCS approach is that it aims to understand and incorporate the perspectives of social actors in the study (e.g., Bray, Adamson, & Mason, 2014). This is common to most qualitative research, especially ethnography and ethnographically-oriented studies. As Willis and Trondman stated, ethnography (and, we would add, other qualitative methods) are "a family of methods involving direct and sustained social contact with agents and of richly writing up the encounter, respecting, recording, representing *at least partly in its own terms* the irreducibility of human experience" (2000, p. 394, emphasis ours).

The CCS heuristic is also informed by a critical theoretical stance. By critical, we mean that the approach is guided by critical theory and its concerns and assumptions regarding power and inequality. Drawing upon Marxist, feminist, and critical race theory, among others, critical theory aims to critique inequality and change society; it studies the cultural production of structures, processes, and practices of power, exploitation, and agency; and it reveals how common-sense, hegemonic notions about the social world maintain disparities of various sorts. Attention to power and inequality is central to the CCS approach.

In addition to these features of the CCS, we have developed it as a way to "unbound" culture while still seeking to conduct rich descriptions of the phenomenon of interest to the researcher. Traditional approaches to case study work tend to rely on a homeostatic notion of culture as bounded and unchanging, like a set of rules (e.g., Stake, 1994). But major sociological work propelled the notion of culture from "a set of rules" to something more akin to principles or understandings that people used to "make sense" (Garfinkel, 1984, 2002) or develop a "feel for the game" (Bourdieu, 1990). Furthermore, scholars averred that what is important is not cultural difference per se, but when and how cultural difference is made consequential—for example, when difference is cast as deficit or disability (e.g., McDermott & Varenne, 1995). This idea suggests that culture must be considered in relation to economic, political, and social phenomena; as anthropologist Sherry Ortner (1999) argued, "the point is not that there is no longer anything we would call 'culture,' but that interpretive analysis of social groups should be situated within and, as it were, beneath larger analyses of social and political events and processes" (p. 9). Contemporary notions of culture focus on "practice or performance and hence emphasize the process of making meaning over the meanings themselves" (Anderson-Levitt, 2012, p. 443). Today, anthropologically-informed scholarship generally treats culture as an ever-changing, active, productive process of sense-making in concert with others (Erickson, 2011). Contests over meaning and practice are influenced by power relations, including direct imposition and, more commonly, the cultural production of "common sense" notions of social order. Like Burawoy and his co-authors (1991) who write about "ethnography unbound," we are calling for an extended case study blended with multi-sited research that follows processes and phenomena, rather than preemptively bounding the research site.

There are important implications of this shift in conceptualizations of culture for case study research. While case studies frequently include a focus on meaning, this has sometimes been conceptualized as "discovering" the meaning of a particular term or idea among members of *a* culture or sub-culture, such as the meaning of style, respect, or success for working-class youth in Detroit or hedge fund managers in New York City (see Hoffman, 1999 for a critique). In contrast to this sense of (static) culture within a (bounded) group, the understanding of culture that undergirds the CCS approach provides strong justification for the importance of examining *processes* of sense-making as they develop over time, in distinct settings, in relation to systems of power and inequality, and in increasingly interconnected conversation with actors who do not sit physically within

the circle drawn around the traditional case. The CCS warns against static and essentializing notions of culture, recommends attention to cultural repertoires and contestation, and emphasizes the need to consider power relations within a single institution or community and across communities, states, and nations. It also suggests that researchers pay particular attention to language, discourse, texts, and institutions as important social and policy actors. Finally, it insists on attention to social interactions, which may or may not transpire in person. This insight begs a consideration of *context*, another key term we consider central to CCS research.

The comparative case study heuristic draws upon a radical rethinking of context, a concept that is much-cited and yet ill-defined in case study research. Context is often used to indicate the physical setting of people's actions. The importance exerted by context is one of the primary reasons for selecting a case study approach to research. To represent this aspect, some scholars, such as Bronfenbrenner (1977, 1994), refer to contextual or ecological validity. These terms originated in psychological studies to indicate "the extent to which the environment experienced by the subjects in a scientific investigation has the properties it is supposed or assumed to have by the experimenter" (Bronfenbrenner, 1977, p. 516). Since that time, among sociocultural scholars, the term has come to suggest the importance of maintaining the integrity of real-world situations rather than studying a phenomenon in laboratory contexts. The concept offers an implicit critique of the effort to generalize by stripping away the particular. As Geertz wrote, "No one lives in the world in general. Everyone, even the exiled, the drifting, the diasporic, or the perpetually moving, lives in some confined and limited stretch of it—'the world around here'" (1996, p. 262).

This point, we fully agree, is quite important. However, traditional approaches to case study research continue to rely on a rather static, confined, and deterministic sense of context. No "place" is unaffected by history and politics; any specific location is influenced by economic, political, and social processes well beyond its physical and temporal boundaries. As scholars Leander and Sheehy have argued, "context… has been overdetermined in its meaning by a seemingly natural interpretation of material setting or place" (2004, p. 3).

We contend that settings are constituted by social activities and social interactions (Duranti & Goodwin, 1992; Dyson & Genishi, 2005). Indeed, for those who draw upon activity theory, activity itself is the context—made up of actors, their objectives, their actions, and the artifacts they engage, each with their relevant histories (see, e.g., Cole, 1996; Engeström, 1987; Engeström et al., 1999). In this view, context is not a container for activity; it *is* the activity. Engaging a notion of culture as strategic and symbolic "sense making," we can see activities as purposeful efforts to respond to uncertainty in how to move forward (Hoffman, 1999; Ortner, 1999). This way of thinking about context stands in stark contrast to the functionalist paradigm discussed above that informs much traditional case study research. It is also enhanced by Bourdieu's concept of "field," a sym-

bolic arena in which agents are relatively positioned based on the (arbitrary, socially constructed, and open to negotiation) rules of the field, the agent's symbolic capital, and the agent's habitus (Bourdieu & Wacquant, 1992). In short, context is made; it is both relational and spatial in that proximate and distal connections among actors mutually influence each other and, in so doing, produce relevant contextual relations (see also Gupta & Ferguson, 1997; Middleton, 2014).

Our notion of context also attends to power relations and the critical theories of place and space put forward by critical geographers and anthropologists. Massey (1991, 1994, 2005) argued explicitly against the romantic idea that a place has a single, essential identity based on a limited history of territory. She instead promoted a notion of places as "articulated moments in networks of social relations and understandings," with much of that "constructed on a far larger scale than what we happen to define for that moment as the place itself" (1991, p. 28). So-called local contexts, she argues, are quite heterogeneous and produced from the intersection of social, economic, and cultural relations linked to various scales. Anthropologists Gupta and Ferguson (1992) also asserted the importance of examining historically the processes by which local sites with different patterns of social relations came into being, rather than treating them as primordial places. They wrote that "instead of assuming the autonomy of the primeval community, we need to examine how it was formed *as a community* out of the interconnected space that always already existed" (1997, p. 36, emphasis in original; see also Vavrus, 2016).

Not only are sites not autonomous but they are influenced by actions well beyond the local context and the current moment. Thus, the idea of bounding them, which others argue is the hallmark of case study research, is an illusion. The "unbounding" we call for in comparative case study research requires attention to the processes mentioned above. It also requires attention to *scale*. Scale is often used to distinguish local, regional, national, and global levels, though critical geographers of education have argued forcefully against the tendency to conceptualize these as distinct and unrelated (Taylor et al., 2013; Lingard and Rawolle 2011; Larsen and Beech, 2014). As Bruno Latour stated, "the macro is neither 'above' nor 'below' the interactions, but *added* to them as *another* of their connections" (2005, p. 177). In CCS research, one would pay close attention to how actions at different scales mutually influence one another.

This reconceptualization of context using spatial theory (e.g., Massey, 2005; Gupta & Ferguson, 1997) has important implications for case study work. It encourages us to attend very carefully to the social relations and networks that constitute the most relevant context in one's research and how these relations and networks have formed and shifted over time. Context is not a primordial or autonomous place; it is constituted by social interactions, political processes, and economic developments across scales and across time. Rethinking context steers us away from "bounding" a study *a priori* and, instead, makes the project one of identifying the historical and contemporary networks of actors, institutions, and policies that produce some sense of a bounded place for specific purposes

(for examples, see Vavrus & Bartlett, 2009). This inversion of the case study research process has important implications for comparison.

Finally, we argue that traditional case study approaches miss a major opportunity by not integrating comparison more centrally into their work. In his early work, Stake was quite circumspect about the value of comparison. Because he valued the particular elements of each case, Stake warned that "direct comparison diminishes the opportunity to learn from" the case (1994, p. 240). He continued: "I see comparison as an epistemological function competing with learning about and from the particular case. Comparison is a powerful conceptual mechanism, fixing attention upon the few attributes being compared and obscuring other knowledge about the case" (1994, p. 242). Stake felt that comparison prompted the decomposition of cases into variables. He contrasted comparison to thick description, and he stated that comparison downplays "uniqueness and complexities" (2003, pp. 148-149). His later work was more positive but quite vague, about the possibilities of comparative case studies (2006).

In contrast, we argue forcefully for the value of comparison in case study research. We encourage comparison across three axes: a *horizontal* look that not only *contrasts* one case with another, but also traces social actors, documents, or other influences *across* these cases; a *vertical* comparison of influences at different levels, from the international to the national to regional and local scales; and a *transversal* comparison over time (for extended examples, see Vavrus & Bartlett, 2009). The horizontal and the vertical should be considered historically, but often are not; hence the need for the third axis. Further, we acknowledge that this stance may require a different logic of comparison.

Our processual approach to comparison considers strings of relevant events and actors; it eschews staid notions of culture or context to consider those processes *across space and time*; it *constantly compares* what is happening in one locale with what has happened in other places and historical moments. These forms of comparison are what we call horizontal, vertical, and transversal comparisons. What we aim for with our comparative case study is akin to what anthropologist Ulf Hannerz dubbed "studying through" (2006, p. 24). The horizontal axis compares how similar policies or phenomena unfold in *distinct locations* that are *socially produced* (Massey, 2005) and *complexly connected* (Tsing, 2005, p. 6). The vertical axis insists on simultaneous attention *to and across scales* (see also Bray & Thomas, 1995; Nespor, 2004, 1997). The transversal comparison *historically* situates the processes or relations under consideration (for an extended example, see Vavrus & Bartlett, 2013).

Conclusion

In this article, we proposed a reconsideration of the logic of comparison and urged the addition of a "tracing" comparative logic to the toolbox of comparative education research. We outlined our proposed comparative case study approach, which reconsiders key notions of culture, context, place, space, and comparison, and contrasted our approach

to the traditional and influential case study literature. We argued that context should not be defined as place or location, but it should rather be conceptualized as something spatial and relational. We also explained why we eschew a static, bounded notion of culture in favor of a view of culture as an on-going, contested production. These notions are consequential for how we conceptualize case studies and comparison.

The Comparative Case Study Approach promotes a model of multi-sited fieldwork that studies through and across sites and scales. It encourages simultaneous and overlapping attention to three axes of comparison: horizontal, which compares how similar policies or phenomena unfold in locations that are connected and socially produced; vertical, which traces phenomena across scales; and transversal, which traces phenomena and cases across time. This revisioning has the potential to strengthen and enhance case study research in Comparative and International Education.

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