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The Refiguration of Spaces and Methodological Challenges of Cross-Cultural Comparison

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methods

Abstract: In most reflections on cross-cultural comparison, scholars assume that "cultures" can be relatively clearly demarcated spatially and that "space" itself is a given entity. However, theories such as the theory of refiguration of spaces have stressed both that it is important to deconstruct the category "space" itself and that social processes have been characterized by major spatial transformations since the mid-twentieth century. Based on this idea, in two *FQS* thematic issues scholars from various disciplines will ask what consequences the refiguration of spaces has for cross-cultural comparison and what one can methodologically learn from research on cross-cultural comparison about the analysis of refiguration of spaces. In the first issue, authors from sociology and historical sciences are focusing mostly on the methodological issues. In this article, we provide a frame for this debate by ordering the earlier discussion on cross-cultural comparison along four questions: Why do we compare? Who or what are we comparing where and when? How can we compare? What methodological conclusions can be drawn from the debate on cross-cultural comparison concerning the analysis of social processes across different spatial scales and time layers in order to assess causality?

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1. The Refiguration of Spaces as a Challenge to Practices of Comparison

Scholars have been debating for centuries, if, why, and how researchers should and can compare cultures and other social phenomena. Both the way this discourse has unfolded and the specific answers that have been given to these questions themselves vary culturally. At the same time, this discourse is deeply entangled with the founding of sociology and other social-science disciplines in the early twentieth century. As a result, the ways disciplinary boundaries between sociology and other disciplines are drawn and how sociology (and other disciplines) practice (cross-cultural) comparison vary culturally, too. [1]

Furthermore, the modern system of science has been developed more or less in parallel to the process of nation-building (BAUR, 2016; MANDERSCHEID, 2021). Norbert ELIAS (1997 [1939]) showed that in Europe, ever since the middle ages, civilizing and nation-building processes have been mutually stabilizing and driving each other along established trajectories with typical trends and countertrends. Using the concept of "figuration," ELIAS (1986) stressed that different scales—namely the micro level (ELIAS, 2002 [1969]) and the macro level (ELIAS, 1997 [1939])—, are intertwined, co-develop (KNOBLAUCH & LÖW, 2017; LINKLATER & MENNELL, 2010; LÖW 2008), and, within this process, (re-)produce social inequality, by including "established" insiders and excluding "outsiders"¹ (ELIAS & SCOTSON, 2002 [1965]). As a result of colonialism, this European model of the nation state has become a global model of organizing the social, and within a nation state, people share a national character (MENNELL, 2020). European nation states have used various means for competing and consolidating their power (LINKLATER & MENNELL, 2010), one of them being promoting and controlling knowledge production by systematically developing the modern system of science (BAUR, 2016). [2]

In other words, from the beginning, academic knowledge production within the modern system of science has been deeply entangled with the nation state (MANDERSCHEID, 2021), and for methodological practices of comparison, this has had several consequences (which we shall reflect in more detail below), most of which can be subsumed by the concept of "methodological nationalism":

1. When discussing "cross-cultural comparison," scholars often unthinkingly imply comparing social processes in different nation states. In other words, researchers often assume that "cultures" can be relatively clearly demarcated spatially and that "space" itself is a given entity.
2. Most social science methodologies are fitted to analyzing single national cultures, and this is rarely reflected in research practice. In fact, many scholars are not even aware how much their research styles are culture-specific.
3. Whenever scholars do compare distinct cultures, manifold methodological problems arise, and indeed, in the last two hundred years, methodological

1 All translations from German texts are ours.

discourse has provided some solutions. Yet, many issues remain unresolved. Many researchers have reacted to these methodological challenges by withdrawing to safe terrain and limiting themselves to analyzing the (national) societies they are most familiar with. As the global system of science itself has a firm center-periphery-structure—with the USA being at the center and most other countries of the Global North being at the periphery (BAUR, 2016)—, this means that most social-science research is conducted by scholars from the Global North, using national societies of the Global North as empirical case studies. As a result, most social science methodologies, including practices of comparison, are tailored to the Global North. [3]

Within social-science discourse, these limitations of practices of cross-cultural comparison have been long and repeatedly criticized. However, in recent decades, resolving these methodological issues has become more pressing as a result of social change. Namely, since the 1970s at the latest, the process of nation-building seems to be increasingly substituted by opposing processes and counter-movements. In other words, the specific pattern whereby social and spatial transformations are interwoven has fundamentally changed (MILLION, HAID, CASTILLO ULLOA & BAUR, 2021). [4]

Following up on ELIAS (1986), Hubert KNOBLAUCH and Martina LÖW (2017, 2020) described the current processes of spatial reconfiguration and reorganization of society as a "refiguration of spaces." They argued that the category "space" itself needs to be deconstructed as the social is a decidedly spatial phenomenon, and they suggested to develop an empirically-grounded theory of contemporary social change as processual, spatial-communicative reconfiguration. Together with colleagues in the context of the Collaborate Research Center [The Refiguration of Spaces](#) (CRC 1265), they empirically illustrated that the concept of refiguration of spaces provides a conceptual framework for a theory-pluralistic and interdisciplinary approach, integrating both *handlungstheoretische* [action-theoretical] and *praxistheoretische* [practice-theoretical] as well as *materalistische* [materialistic] approaches (KNOBLAUCH, 2019; KNOBLAUCH & STEETS, 2020; LÖW, 2020). In their collaborative analysis, these researchers revealed that within this refiguration of spaces, three processes unfold in parallel: polycontexturalization, mediatization, and transnationalization (KNOBLAUCH & LÖW, 2017, 2020; MILLION et al., 2021). The theory of refiguration of spaces thus has proven to provide a fruitful perspective for social research, as it allows to analyze spatial change across different social dimensions as a consequence of tensions between different figurations. In addition, the concept allows to systematically take into account both the diversity and the contradictory nature of spatial transformations. In particular, the theory makes it possible to grasp social entities across different spatial scales—ranging from neighborhoods to states to global spatial arrangements—as interconnected webs of dependency. The theory also allows researchers to simultaneously analyze actors' knowledge (psychogenesis), communicative action (interactions), and objectified and institutionalized spatial arrangements (sociogenesis). Building on ELIAS' description of processes of centralization which resulted in the formation of the nation state (LINKLATER &

MENNELL, 2010), the new concept of reconfiguration of spaces enables researchers to investigate the reordering and rearrangement of this spatial centralization and relationalization in a global context (KNOBLAUCH & LÖW, 2020; LÖW & KNOBLAUCH, 2021). [5]

In regard to methodological issues concerning cross-cultural comparison, the most important points made by advocates of the theory of refiguration of spaces (and other theories trying to grasp spatial transformations) is the entanglement of space and time:

"[I]n order to fully understand them [the entanglement of space and time], it is important to keep in mind that spaces are refigured on different spatial scales—from specific localities and neighborhoods to cities, regions, and nation states, throughout the entire world-system—and that processes of refiguration unfold within different time layers. It is therefore especially important not only to carefully consider spatial transformations in the *longue durée*, but also to pay closer attention to the interactions of spatial transformations across different scales and time layers, as the patterns of refiguration become more specific and distinguishable" (MILLION et al., 2021, in press). [6]

In other words, the firm methodological frame of the nation state and national cultures is dissolving (PFETSCH, 2014; PFETSCH & ESSER, 2008, 2014). Based on this finding, in this and the next FQS thematic issue, authors from various disciplines will ask:

- How does the concept of refiguration of spaces relate to other theoretical concepts in spatial, process-oriented and/or historical sociology? What can be criticized or improved about the concept? What types of blind spots does the concept have and how can these can be overcome?
- What consequences has the refiguration of spaces for the methodology and practice of cross-cultural comparison?
- What can one learn methodologically from research on cross-cultural comparison about the analysis of the refiguration of spaces? [7]

There is a long social science discourse on if, why, and how one can and should compare cultures. For example, in the German-language academic debate, scholars started to systematically reflect upon *Vergleichen* [comparison] and *Kulturvergleich* [cross-cultural comparison] in the nineteenth and early twentieth century—in other words, the debate started much earlier than in many other language communities. Possibly, this strong interest in epistemological and methodological issues of comparison was triggered very early because from the beginning, German-language sociology has been strongly influenced by philosophy and philosophy of science, and until the Bologna reforms in the early 2000s, basic training in philosophy of science was a self-evident and unquestioned component of any first-year university course in methods of social research. Unfortunately, a large part—and especially the older part—of this very nuanced and reflected debate has been published only in German and never

been translated to English, thus being unavailable to an international audience, although in many ways, (especially older) contributions are insightful for ongoing debates. Therefore, as a kind of side-theme of this thematic issue, we also aim to make the older German-language debate accessible to an international audience and to further this debate, which is why most of the bodies of literature we refer to are written in German or by German-language authors. [8]

In the classical German-language sociological debate in the nineteenth and early twentieth century, debates on cross-cultural comparison were largely defined by the methodological conflict between historians and sociologists. Therefore, in this thematic issue, we will mainly focus on methodological issues from the perspective of historians and sociologists. In the next thematic issue, we will extend the array of disciplines by including contributions by authors from other spatial disciplines such as anthropology, architecture, geography, and urban planning. We will also shift the focus to more strongly stressing the differences between theoretical schools within sociology, as well as illustrating how empirical analyses change, if one moves practices of comparison beyond the boundaries of methodological nationalism. [9]

In order to frame the methodological discussion within and between the papers in this thematic issue, in this article, we will outline the major methodological challenges that have so far been identified in the debate on cross-cultural comparison. We will start with discussing why and to what ends social scientists need to and do compare (Section 2). A key finding of the debates on the refiguration of spaces and other spatial transformations is that—in order to empirically grasp ongoing social processes—it is necessary also to compare social units at other spatial scales and to take into account that the units of analysis themselves might be changing over time. So what do researchers need to think about when defining cases, fields or populations and contexts, when selecting cases and generalizing them, and how can they move beyond methodological nationalism (Section 3)? When taking into account that social phenomena are relational—an example being the process of transnationalization—it becomes clear that it won't suffice for social scientists merely to compare cases—they also need to link and relate them. This in turn poses a methodological challenge, as scholars can only soundly relate social phenomena observed at different places—say Berlin, Nairobi and Singapore—if they know which of the observed differences (or similarities) are substantial differences (or similarities) and which are a result of different practices of comparisons—that is, so-called methodological artifacts. Therefore, in Section 4, we ask: How can we compare? Many social theories aim at assessing causality and empirically analyzing social processes across different spatial scales (micro-macro-analysis), or—in figurational sociological terminology—at grasping complex chains of interdependence. Consequently, we ask in the final section: What methodological conclusions can be drawn from the debate on cross-cultural comparison concerning the analysis of social processes across different spatial scales and time layers in order to assess causality (Section 5)? [10]

2. Why Do We Compare?

When reflecting upon comparison, a first question to be resolved is: Why do we compare at all? Concerning this issue, there is a long and differentiated debate which can be summed up to two basic positions which can be exemplified as the DURKHEIMIAN and the WEBERIAN approach and which have very distinct methodological consequences (SMELSER 1976). [11]

2.1 Comparison as substitute for laboratory experiments

In the course of founding and institutionalizing sociology as an academic discipline during the nineteenth and early twentieth century, scholars intensively debated whether sociology should be conceived as a *Naturwissenschaft* [science] or a *Geisteswissenschaft* [humanity] and what methodological approach would be best suited for social research (BAUR, KNOBLAUCH, AKREMI & TRAUE, 2018): In France, the debate was decisively influenced by Émile DURKHEIM (1859 [1895]), who suggested sociology to be conceived as a science (SMELSER 1976). Consequently, DURKHEIM saw researchers' subjectivity and positionality as a problem and demanded that social research should be as non-interpretative as possible. From his point of view, like natural-science research social research should be mainly explanatory and thus primarily focus on identifying and testing causes and consequences of "social facts"—that is, structures. [12]

In the natural sciences, the main method for assessing causality is the laboratory experiment. However, experiments are of limited use in the social sciences. They are particularly unsuitable for addressing long-term social change or macro-social phenomena, as here, experimental control is simply not possible (BAUR, 2018, pp.312-316). Therefore, DURKHEIM suggested two alternative methods for experiments: statistics and the method of comparison (SMELSER 1976). DURKHEIM conceived the latter as especially suitable in cases when the number of cases is too small for inferential statistics, such as cross-cultural research. In other words, he conceptualized cross-cultural comparison as the ideal method for analyzing macro-social phenomena and long-term social phenomena. Regardless of whether researchers work quantitatively using statistics or conduct cross-cultural comparisons, this type of research is variable-oriented (ABBOTT, 2001; RAGIN, 2000, 2008) and has been decidedly non-interpretive to this day (BAUR et al., 2018). [13]

In research practice, DURKHEIM and early sociologists applying his methods selected cases in a specific way based on assumptions derived from DURKHEIM's social theory: DURKHEIM distinguished between modern and traditional societies and assumed that Western European and North American societies were "modern," while all other societies were "traditional" (implying "backward" and "undeveloped"). Therefore, in order to study processes of modernization, scholars adapting this theory typically selected Western European or North American countries as cases for modern societies and other countries as cases for traditional societies. Amongst others, historical sociologists and postcolonial researchers have for a long time been criticizing these assumptions

for various reasons. These assumptions are not only demeaning by devaluing cultural practices in the Global South but also imply that societies will converge in the *longue durée*—in contrast, historical-comparative sociology has shown that there are not only multiple paths for modernization but also that social processes intersect and are entwined (SPOHN, 2011). Note that it is possible to conduct cross-cultural comparison as a substitute for social experiments in the positivist tradition without classifying the world into "modern" and "traditional" societies. However, due to the strong influence of modernization theory, this has been widely done in research practice. [14]

This positivist understanding of social research was not only typical of the *Wissenskultur* [epistemic culture/knowledge culture] in early French sociology, but was also adapted by Talcott PARSONS, whose methodological concepts were strongly influenced by DURKHEIM's work. PARSONS in turn introduced DURKHEIM's methodological principles—including the idea of comparison as a substitute for laboratory experiments and the idea of classifying the world in terms of modern and traditional societies—into the US-American methodological debate. Due to the hegemonic position of the USA in the world system of science since the 1950s, these ideas diffused through the international debate on social science methodology (BAUR et al., 2018). As a result, up to today, the major part of international quantitative and comparative social research—including political science research—is oriented toward the natural science model (KRAUSE, 2016). [15]

In the end, structuralism not only dominated French social research but eventually triggered postmodernist and poststructuralist critique. In recent years and as a result of reflecting upon this criticism, scholars engaging in this debate (e.g., AMOSSÉ, 2016; BEHRISCH, 2016; DESROSIÈRES, 2005, 2011; DIAZ-BONE, 2016; DIAZ-BONE & DIDIER 2016; SALAIS, 2012; SPEICH CHASSÉ, 2016; THÉVENOT, 2011, 2016; WHITESIDE, 2015) have noted that data themselves are socially constructed and that "numbers" and "facts" can be and are used as instruments of domination. As a result, these scholars have increasingly demanded the deconstruction of data and methods (BAUR et al., 2018). In this thematic issue, Katharina MANDERSCHIED (2021) provides an example of such a deconstruction of methodological assumptions. In her article on "Concepts of Society in Official Statistics," she argues that the emergence of modern nation states has resulted in specific conceptions of individuals, populations (societies) and their spatial boundaries. During the process of nation-building, political actors promoted the development of official statistics—which are the first example of traditional-type big data—as a tool of power. Official statistics transformed political concepts into measurable categories and empirical realities. The unreflected use of official statistics in social science research has in turn effects for interpreting findings and theory-building—as stated above, this phenomenon has been subsumed under the concept of "methodological nationalism": for a long time in quantitative social research, the typical study population was the adult resident population of a nation state. MANDERSCHIED argues that—when conceiving societies as territorial containers consisting of an immobile population—scholars assume and reify congruencies between

(national) territory, culture and society. However, as a result of the refiguration of spaces, this practice is increasingly distorting research results. Specifically, as a result of transnationalization, increasing migration challenges the idea of a constant, clearly assignable, and uniform resident population within a demarcated territory (*ibid.*). How important it is for social-science researchers not to restrict themselves to territorially-bound resident populations is revealed, for example in Admire CHERENI's (2013) contribution on migration in African cities or in the debates e.g., in the *FQS* thematic issue on "Qualitative Migration Research in Contemporary Europe" (BORKERT, MARTÍN PÉREZ, SCOTT & DE TONA, 2006). At the same time, political and economic transnationalization decreases the importance of national territories, and national borders become fragile, so that this seemingly clear demarcation of fields becomes increasingly problematic. Mediatization also has consequences: between the 1970s and early 2000s, quantitatively-oriented sociologists mainly focused on surveys as means of data collection and refined techniques of cross-cultural survey research (BAUR, 2014). Prior to that period, they preferred traditional-type big data—such as official statistics and other public-administrative data (BAUR, 2009). Since the early 2000s, modern-type big data—such as Web 2.0 data—have become increasingly fashionable (BAUR, GRAEFF, BRAUNISCH & SCHWEIA, 2020). However, big data are misleading in the sense that they do *not* solve the problem of methodological nationalism—on the contrary: while with cross-cultural surveys at least the population, as well as the assumptions made when defining this population, are clear, with big data neither the population nor the assumptions made concerning this population are clear. [16]

2.2 Comparison in order to improve interpretation

While researchers in the positivist tradition aim at ruling out any interpretative leeway, including their own positionality, scholars in the interpretative tradition argue that this is not possible because not only social reality but also scientific knowledge is socially constructed (KNOBLAUCH, BAUR, TRAUE & AKREMI, 2018). This in turn implies that methodology and epistemology do not necessarily reveal social reality—if they are based on the wrong assumptions, they can also obscure social reality (DIRIWÄCHTER & VALSINER, 2005). In this tradition of thought, comparison is an unavoidable basic operation of human thought—humans cannot do anything but compare, as any basic concept and term in any language implies a comparison (SCHULZE, 2004, pp.15-27; see also SCHULZE, 1998). For example, the word "snow" implies that there is something in the world that is "not snow." Note that this way of conceiving "comparison" does not presume that researchers have to compare "cultures"—on the contrary, it implies that one can compare anything with anything else, which in turn makes it possible to ask: "Who or what should we compare?"—a question we will address in the next section. [17]

A good example of a scholar following this way of conceptualizing comparison is Max WEBER, who not only believed that comparison was an unavoidable but was also an absolutely necessary methodological procedure in social research. However, while DURKHEIM conceived comparison as a substitute for

experiments in order to assess causality, for WEBER comparison was a tool for improving interpretation (BAUR et al., 2018). Similar to DURKHEIM, WEBER's conceptualization of comparison was deeply entangled with his way of envisioning sociology as a discipline, and embedded in the methodological debates of the national academic system of his time: as stated above, in the nineteenth and early twentieth century, German academics not only discussed issues of comparison but also fiercely debated the relationship between the natural sciences and the humanities, including which methodological approach should be preferred. [18]

For scholars interested in analyzing social processes, the methodological differences were epitomized by historicism on the one hand, and official statistics—which were widely practiced in national economics—on the other hand: statisticians of the times assumed that their categories and data would speak for themselves and produce facts (DESROSIÈRES, 2005; ZIEGLER, 2018)—we already discussed above how problematic this assumption is (see also MANDERSCHIED, 2021). Historicists primarily engaged in the *l'histoire des événements* [history of events] and likewise assumed that cases spoke for themselves—i.e., did not need to be interpreted (ARIÈS, 1988 [1986], p.24; RÜSEN, 1993, pp.95-113; SIMON, 1996, pp.69-79; ZIEMANN, 2000, pp.53-55). Early German-language sociologists criticized the methodological frameworks of both research traditions and argued that both traditional-type big data such as official statistics and historical sources are constructed and therefore in need of interpretation. If researchers do not reflect on the categories used, they implicitly reify existing power structures (BAUR et al., 2018). In fact, this methodological critique was one of the reasons why scholars like WEBER propagated the founding of sociology as an academic discipline: early German sociologists suggested that sociology should be a complementary science to historical sciences, statistics and economics: by providing theoretical and methodological reflection, sociology should provide scholars with the tools for controlling their subjectivity, for better reflecting their blind spots and for improving interpretations (KRUSE, 1990). In this tradition of thought, the primary goal of "methods of social research" is not to develop refined and fancy procedures and techniques, but to reflect methodology and handle interpretativity (BAUR, 2008). Therefore, WEBER suggested a "third way" of doing social research—that is, sociology should be neither natural science nor humanity but *Kulturwissenschaft* [cultural science] (SMELSER, 1976). WEBER wanted sociology both to *Verstehen* [understand] and *Erklären* [explain/assess causality in] social processes, but also argued for the primacy of understanding, as he assumed that one could not explain any social processes without understanding actors' goals and motives for action (BAUR, 2018, pp.347-352). Therefore, WEBER's methodological approach was explicitly interpretive from the outset (BAUR et al., 2018). In order to improve interpretations, he introduced the ideal type as a methodological instrument (BALOG, 2008), and he primarily used comparisons to improve interpretations of the object domain (SMELSER, 1976). [19]

While WEBER's conception of comparison has been somewhat neglected in the post-war international methodological debates for the reasons discussed above,

we believe that for grasping current social processes, it is much more fruitful, which is why in the following we adapt a WEBERIAN approach to comparison (KALBERG, 2001). Namely, we assume that comparison is a basic and unavoidable procedure of human thought which—if conducted wisely—can improve interpretations. Because, according to this tradition, anything can be compared with anything, the next question to be asked, is: Who or what should we be comparing where and when? This question is intrinsically linked both to issues of how to construct appropriate units of comparison and how to sample and select cases. [20]

3. Who or What Should We Compare Where and When?

3.1 Defining cases, populations and contexts

When abolishing the idea that social science research always compares resident citizens in nation states, the first question researchers have to ask when practicing comparison is, actually, what their units of comparison (or cases) are, how these should be selected and how this effects generalizability and transferability (PFETSCH & ESSER, 2014). From a methodological point of view, "cases" are "individuals." However, "individuals" do not necessarily need to be persons—on the contrary, almost anything can be a case, which is why researchers actively have to define their cases along four dimensions (CHRISTMANN & BAUR, 2021):

- substantially (for example, the economy versus education or cultural production and consumption);
- temporally (for example, situations, events, interventions, social processes, innovations, or decision-making procedures);
- spatially (for example, neighborhoods, cities, regions, nation states, or world regions); and
- concerning the level of aggregation. Besides persons, cases can be entities of a higher levels of action, e.g., social groups such as families or circles of friends, organizations, networks, markets or commodity chains. [21]

Cases are usually part of a "field" or "population" which also need to be defined along the above dimensions (BAUR, KELLE & KUCKARTZ, 2017, pp.24-25). In addition, cases themselves may consist of "sub-cases" or "subunits"—they thus might consist of several levels of aggregation (AKREMI, 2014, p.270; see also PFETSCH & ESSER, 2008; PFETSCH, MAURER, MAYERHÖFFER, MORING & SCHWAB CAMMARANO, 2014). For example, states often consist of different regions and cities, which consist of neighborhoods, which consist of households, which consist of multiple families. Urban neighborhoods consist of actors, residents, networks, events, actions, media coverage, etc., among others (CHRISTMANN & BAUR, 2021). Furthermore, cases are often embedded into specific cultures or spatio-temporal social contexts (PFETSCH & ESSER, 2014; PFETSCH et al., 2014)—and it is often unclear, what "case," "context" and "culture" is or whether "culture" is the case (CHRISTMANN & BAUR, 2021). In

addition, scholars also have to define what they mean by "culture," as "culture" can be defined in very different ways (RUNDELL & MENNELL, 1998), and this in turn influences how "culture," "context" and "cases" can be delimited (CHRISTMANN & BAUR, 2021). Furthermore, cases of the same social context are often systematically interrelated, that is, cases of, say, the same family, organization, city or nation are often very similar (ABBOTT, 2001). As a result, cases, fields or populations and contexts are actively constructed by researchers, and doing so is an important step in any comparative study. This has been most intensively discussed in case study research (HARRISON, BIRKS, FRANKLIN & MILLS, 2017) and ethnography (NAESS, 2016). For example, HARRISON et al. (2017, §29) argued from a point of view of case study research:

"Defining the case (unit of analysis or object of the study) and bounding the case can be difficult as many points of interest and variables intersect and overlap in case study research. Developing research questions and/or propositions to select the case, identify the focus, and refine the boundaries is recommended to effectively establish these elements in the research design [...]. Bounding the case is essential to focusing, framing, and managing data collection and analysis. This involves being selective and specific in identifying the parameters of the case including the participant/s, location and/or process to be explored, and establishing the timeframe for investigating the case." [22]

3.2 Selecting cases and generalizing

After having defined cases and fields or populations, scholars have to decide how to sample—that is, how to select cases. In this context, they have to keep in mind that case selection is closely linked to how they can generalize or transfer their research results to other contexts (BAUR & CHRISTMANN, 2021). When reflecting upon case selection and generalization, it becomes obvious, that quantitative research is at a particular disadvantage, as quantitative researchers typically use inferential statistics in order to generalize, and in order for inferential statistics to work, some basic assumptions have to be made and a strict logic has to be followed—any derivation from this logic will endanger the logic of generalization (ibid.; see also THIERBACH, HERGESELL & BAUR, 2020):
researchers

1. define the population and the cases concerning all four dimensions (substantial, temporally, spatially, concerning level of analysis);
2. calculate the ideal number of cases in the sample using probability theory;
3. randomly select cases from the population. "Random principle" means that each case has a chance of entering the population that can be calculated in advance;
4. collect data on the selected cases, prepare them and analyze them, usually with the help of descriptive statistics;
5. generalize the results of descriptive statistics to the population using inferential statistics (also: "inductive statistics"). Researchers express the

degree of certainty with which they generalize by "significance levels" (in "statistical tests") or "confidence levels" (in "confidence intervals"). [23]

Against the backdrop of the refiguration of spaces, the biggest problem quantitative sampling and generalization techniques face is the need to define a population spatially, that is, to define a set territory—this implies, that quantitative research can only generalize results as long as it sticks to the idea of territoriality. As for practical reasons it is often only possible to collect data within a national territory (BAUR, 2014) or at lower levels of analysis, in research practice, it is currently impossible for quantitative research to drop the assumption of methodological nationalism without also giving up the idea of generalization (BAUR & CHRISTMANN, 2021). Moreover, RAGIN (2000, pp.3-119) has pointed out that the way the population is defined also influences causal analysis, as all variables used to define the population are automatically held constant and therefore can no longer be examined concerning their explanatory potential. [24]

Fortunately, qualitative research has developed many alternative ways of selecting cases and generalization (BAUR & CHRISTMANN, 2021; HERING & JUNGSMANN, 2019 [2014]; METCALFE, 2004). For example, in this issue, Matthias MIDDELL (2021) argues in his contribution on "Cross-Cultural Comparison in Times of Increasing Transregional Connectedness" that depending on their historical context, such comparisons are related to the study of entanglements in one way or the other. In order to address these entanglements, historical sciences have combined principles of *Vergleich* [comparison] and *Verflechtungsanalyse* [studying entanglement] in order to improve reflexivity. When applying such approaches, scholars move away from conceptualizing cases as fixed static entities towards grasping social processes in their complexity, as well as from conceiving "generalization" as mere "quantification" of observations. [25]

4. How Can We Compare?

In addition to defining, what comprises a case and which cases should be compared, scholars have to resolve the question how these selected cases can be compared. When posing these questions, scholars move from sampling to data collection and analysis. The key methodological issue to resolve is that, when comparing cases in social research, scholars will typically observe differences (and similarities) between these cases. However, sociology of science and methodological research have illustrated that there are several reasons why such differences (and similarities) might be observed. On the one hand, they might rise from actual empirical differences (and similarities) in the subject area, which is what scholars are usually interested in. On the other hand, such differences (and similarities) might be methodological artifacts which in turn might have several causes, amongst them differences (and similarities) in (both the researchers' and the researched') theories, concepts, and language; researchers' positionality and epistemic culture; and differences in the methods applied. In order to compare cases, it does not suffice for researchers to assess that such

methodological effects might occur but it is also necessary to disentangle them from substantial findings. [26]

4.1 Theories, concepts, and language

Within social science methodological discourse, scholars have long agreed that, depending on the social theories and concepts scholars apply in their research, their perspectivity will vary; and that this in turn will both influence the types of questions they ask *and* also what types of answers they get (BAUR, 2008, 2017). This is exactly why social theory and theoretical reflection are so important in social science discourse and why authors usually start articles with an explication of their theoretical perspective as well as a definition of key concepts. However, the actual methodological challenge is much more fundamental, as perspectivity is limited neither to the researcher nor to the level of social theory. [27]

Instead, in the course of the twentieth century, scholars from disciplines and research fields as varying as linguistics (WHORF, 1963 [1956]; also see WERLEN, 2002), historical sciences (KOSELLECK, 1979, 2010; also see LAMNEK, 2005, pp.62-66), survey research (BAUR, 2006; HARKNESS, VILLAR & EDWARDS, 2010; KROMREY, 2002 [1980], p.72-77; 111-147; RIPPL & SEIPEL, 2008, pp.57-77, 94-95; WARNER & HOFFMEYER-ZLOTNIK, 2009) and biographical research (FUCHS-HEINRITZ, 2009 [1984]; ROSENTHAL, 2019 [2014]) have repeatedly pointed out perspectivity is deeply engrained in language in the sense that every language is a system of thought which provides a specific world-view and strongly influences people's way of thinking. Who can think and say what where and when, as well as how people can tell a story, strongly depends on the language in which a story is told (FUCHS-HEINRITZ, 2009 [1984], pp.13-84; ROSENTHAL, 2019 [2014]). For social science methodology, this not only means that it is of great importance in which language for example interviews are conducted, but also that it is not easy at all to translate either data or findings, as meanings might change or shift when translating concepts from one language to another. A prominent example is Karl MARX's theory of the social: in the German original version of his work, MARX distinguished between *sozialen* [social] and *gesellschaftlichen* [societal] phenomena—in English translations of MARX's texts, this distinction has been rarely made despite it being important for MARX's argument (ROTH, 2018). The importance of language has been repeatedly stressed earlier in *FQS*. For example, in the *FQS* thematic issue on "Qualitative Research in Ibero America," CISNEROS PUEBLA, DOMÍNGUEZ FIGAREDO, FAUX, KÖLBL and PACKER (2006) stressed how difficult it is to organize academic discourse between English-speaking and Spanish- and Portuguese-Speaking scholars, as it is not only hard to translate concepts but also that the mere ability to speak and write in English might decide who is included or excluded from academic discourse. [28]

Social science methodology has suggested several means for resolving these issues. However, these suggestions also reveal the full extent of the problem. For example, when analyzing how written field reports are used, Michelle MILLER-DAY (2008) explained that this is actually a translational performance. Another

common technique is co-researching with interpreters in the field in order to be able to conduct qualitative interviews in a different language than one's own. However, Gwendolin LAUTERBACH (2014) illustrated that this in effect means adding a third person to the interview situation and therefore changing the interaction situation which in turn might have an effect on research results. As Massimiliano TAROZZI (2013) demonstrated for grounded theory methodology, the implications of the use of a specific language in doing research are commonly underestimated, as language affects not only data collection but the whole research process, including coding. In line with these debates, Jo REICHERTZ (2021) in this thematic issue focuses on data analysis in hermeneutics and discusses the "Limits of Interpretation or Interpretation at the Limits." He argues that cross-cultural interpretation is both an issue of language and of everyday practices, and that the interpretation of intercultural data and of intracultural data do not differ fundamentally. REICHERTZ also shows that it is essential that at least some members of the interpretation group are familiar with the language and culture under investigation into the process of interpreting intercultural data. [29]

4.2 Positionality and epistemic cultures

People might not only differ in language but also in their subjectivity and positionality. Again, this is true both on the level of the researchers and the research subjects, and likely it strongly influences results. How people's subjectivity varies, depending on cultural context and social positioning and how this influences data collection—especially interviewer-interviewee-interaction and the reaction of the field to the researcher—has been widely and intensively discussed in *FQS*, both in single contributions (e.g., OLTMANN, 2016; TIETEL, 2000) and in the thematic issues such as those on "Cultural Analysis and In-Depth Hermeneutics—Psycho-Societal Analysis of Everyday Life Culture, Interaction, and Learning" (SALLING OLESEN, 2012) or in "Researcher, Migrant, Woman: Methodological Implications of Multiple Positionalities in Migration Studies" (NOWICKA & RYAN, 2015). [30]

Again, however, the problem runs deeper, because, firstly, subjectivity and positionality do not only apply to the research subjects but also to researchers themselves. Social theorists such as Norbert ELIAS and Pierre BOURDIEU repeatedly stressed that researchers' positionality will not only influence their perspectives but also might result in partiality, which is why they suggested reflexivity as a methodological procedure (BAUR, 2017), which has been refined in recent decades (ROTH & BREUER, 2003). [31]

Secondly, positionality is not only limited to individual researchers. Rather, sociologists of science have provided strong empirical evidence that there are different ways of doing research in general and practicing comparison in particular. In this line of research, Reiner KELLER and Angelika POFERL (2020, §20) conceived "epistemic cultures"

"as more or less clearly distinguishable discursive and practical ways of producing, evaluating and communicating specific (sociological) knowledge. Components of

such epistemic cultures are ways of doing things, including conducting research, developing arguments, publishing, using techniques and objects, distinguishing legitimate from illegitimate references, forming traditions, declaring certain works and figures to be canonical, developing forms of mediation, having specific forms of access to resources and being integrated into 'Order[s] of Discourse'." [32]

KELLER and POFERL argued that epistemic cultures influence the ways researchers produce knowledge, apply theories and methods and pose questions. Epistemic cultures both vary cross-culturally and between disciplines (CISNEROS PUEBLA, FAUX, MORAN-ELLIS, GARCÍA-ÁLVAREZ & LÓPEZ-SINTAS, 2009; MRUCK, CISNEROS PUEBLA & FAUX, 2005). Exploring these differences as well as discussing how they influence social science methodology and research findings has been at the heart of *FQS* right from when the journal was launched: in almost 30 (German, English and Spanish) articles authors from nine countries and about 15 disciplines contributed to the inaugural edition on "Qualitative Research: National, Disciplinary, Methodical and Empirical Examples" (MRUCK, 2000). Only a short time later, in two early *FQS* thematic issues, authors addressed "Subjectivity and Reflexivity in Qualitative Research" (BREUER, 2003; BREUER, MRUCK & ROTH, 2002; MRUCK & BREUER, 2003). In their introduction to the second of these issues, Katja MRUCK and Franz BREUER (2003, Abstract) outlined the dilemma:

"On the one hand, there are many demands from philosophy of science and there are numerous methods that aim at eliminating researchers' impact on the research process except in controlled treatments. On the other hand, the insight spread that researchers, in continuously interacting with those being researched, inevitably influence and structure research processes and their outcomes—through their personal and professional characteristics, by leaning on theories and methods available at a special time and place in their (sub-)cultures, disciplines and nations. This is especially (but not exclusively) true for qualitative research, because qualitative methods are less structured than quantitative methods, and qualitative researchers interact for most part very closely with research participants in their respective research fields. Are there any ways out of the dilemma between the hope of arriving at non-contaminated, valid, and reliable knowledge, on the one hand, and the threat of collecting trivial data, producing (unintentionally) autobiographies, or repeating the same cultural prejudices prominent at a time or place, on the other hand?" [33]

In the following years, scholars repeatedly addressed cross-cultural differences in epistemic cultures, for example in the *FQS* thematic issues on "The State of the Art of Qualitative Research in Europe" (KNOBLAUCH, FLICK & MAEDER, 2005), "Qualitative Research in Ibero America" (CISNEROS PUEBLA et al., 2006) and "Advances in Qualitative Research in Ibero America" (CISNEROS PUEBLA et al., 2009) or in single contributions on differences in epistemic cultures between Germany and the USA (BETHMANN & NIERMANN, 2015) or Germany and France (KELLER & POFERL, 2020). In this respect, Stephen MENNELL (2017) argued for US-American sociology that the US-American

"national tradition of individualism provides a kind of epistemological blockage to their understanding of larger-scale and longer term social processes and structures. [...] [US-American sociologists] may know that modern individuals belong to, and are constrained by, long chains and extensive webs of interdependence with millions of people whom they never meet face-to-face, yet they still tend to focus on each two-person link in a chain, and microsociological theorising still predominates" (p.36). [34]

In the context of this thematic issue, this is important, as, firstly, most qualitative and quantitative methods of social research developed in the US-American context accordingly are well suited to grasp individuals and interaction, but less suited for analyzing social processes across different spatial scales and *Zeitschichten* [time layers] (for the concept of time layers, see BRAUDEL, 1958; KOSELLECK, 2000). Secondly, due to the hegemonic position of US-American sociology in international sociology, these types of methods dominate internationally. Thirdly, this poses a problem exactly because the refiguration of spaces can only be properly grasped, if a methodology is applied that can grasp more complex processes—a point we will come back to in Section 5. [35]

In parallel, authors contributing to discussions in *FQS* have continuously addressed differences in epistemic cultures of different disciplines, for example in the *FQS* thematic issues on "Qualitative Methods in Various Disciplines II: Cultural Sciences" (RATNER, STRAUB & VALSINER, 2001) and on "Qualitative Research on Intercultural Communication" (OTTEN et al., 2009). Margrit SCHREIER (2017) compared qualitative research, arts-based research, mixed methods, and emergent methods. In the context of reflecting upon the refiguration of spaces, epistemic cultures in the spatial disciplines are of special interest. In this context, Monika STREULE (2013) pointed out that the field of urban studies has been transdisciplinary from the start which poses specific epistemological problems. STREULE also showed, that in the field of urban studies, West-European scholars have strongly influenced the international debate. As a result of postmodern and the poststructuralist turns, scholars in this field have become methodologically more strongly entangled with scientific reflexivity and ethnography and theoretically more interested in the production of space. STREULE argued that in order for transdisciplinarity to succeed, it is important to better understand and reflect the methodological and theoretical framework of urban studies in particular and—we want to add—the spatial disciplines in general. We will further this understanding in the second thematic issue on "The Refiguration of Spaces and Cross-Cultural Comparison" by inviting authors from various spatial disciplines—ranging from anthropology, architecture, geography, sociology to urban planning—to engage in discourse. [36]

4.3 Differences in methods

Handling theory, concepts, language, subjectivity, positionality and epistemic cultures does not suffice to ensure that differences (and similarities) in research findings are caused by substantial empirical differences (and similarities). In addition, scholars should apply the same methods of data collection and data analysis in all contexts they are comparing. As simple and as easy as this might sound, this is difficult in research practice, because in fact more often than not measurement of social phenomena in different social contexts is incommensurable. Ironically, quantitative research has reflected and provided more solutions for handling these issues than qualitative research. For example, cross-cultural survey research was already quite refined in the early twentieth century (BAUR, 2014). The likely reason is, that most quantitative researchers are more interested in upholding the ideal of "objective measurement" than most qualitative researchers, and therefore are confronted much more with the corresponding methodological challenges. Therefore, for the following argument, we will focus on contributions made by quantitative researchers (for an overview on the debate, see ANDRESS, FECHTENHAUER & MEULEMANN, 2019; BAUR, 2014; CIECIUCH, DAVIDOV, SCHMIDT & ALGESHEIMER, 2019). [37]

Incommensurability may have various causes. Firstly, it may not be possible to use the same method in all cultural contexts. For example, in Europe, quantitative researchers widely use public administrative data. However, many countries of the Global South do not have a strong tradition of official statistics, and therefore, these data might not be available. Likewise, in Europe, postal surveys and telephone interviews using landlines are commonly used methods of data collection. Postal surveys, however, presume literacy and are therefore only a suitable method in cultures with high rates of literacy. Landlines require a specific telephone infrastructure and are not common in many countries in the world—rather, in many countries, most people have acquired smartphones right away. [38]

Secondly, even if researchers can apply the same method in all cultures, it is not at all easy to standardize data collection and analysis—in fact, within quantitative research, survey methodology has evolved as a research field in its own right. The sole point of discussion is, whether and how to conduct surveys in a way that measurements are as commensurable as possible—and what to do when this is impossible. In this context, in his contribution "The Re-Figuration of Spaces and Comparative Sociology," Wolfgang ASCHAUER (2021) deals with the specific challenges the current refiguration of spaces poses for quantitative research: on the macro-level, quantitative research increasingly faces the challenge of defining populations and units of analysis, as supranational dynamics are gaining importance in the course of globalization. Conceptually, translocal lifestyles are gaining in importance. On the micro-level, new technologies such as GIS facilitate the incorporation of fine-tuned spatial characteristics into quantitative social research. When discussing both possible methodological chances and fallacies of these social processes, ASCHAUER argues that social theory becomes ever more important in order to reflect upon perspectivity. [39]

5. Analyzing Complex Chains of Interdependence

If scholars are interested in refiguration of spaces, analysis does not end with cross-cultural comparison—rather, this is simply the starting point for analysis. In a next step, researchers have to link and relate findings from different contexts. The reason is that the concept of refiguration of spaces assumes that social processes are entwined in space and time (MILLION et al., 2021). In order to assess what type of spatial transformations can be empirically observed over the course of history and how they can be theorized, scholars have to analyze social processes across different spatial scales and time layers in order to assess causality. [40]

These types of analysis are rather complex, and various methodological traditions have made different suggestions of how to conduct such analyses. In an earlier issue of *FQS*, Florian ELLIKER, Jan K. COETZEE and P. Conrad KOTZE (2013) have made a suggestion of how discourse analysis can be used in order to disentangle discourses (macro-level) and their reproductive local context (micro-level) as well as how to analyze these micro-macro-interactions in the course of the social process. This thematic issue will conclude with several contributions from other research traditions on how to conduct a comparative process-oriented micro-macro-analysis. [41]

Using the example of "Refugees, Migration and the Tightening Borders in the Middle East," Johannes BECKER (2021) shows how biographical research can be used to conduct a comparative analysis of such complex processes. BECKER (2021) argues that with its diachronic focus on socio-historical processes and life and family histories, biographical research can analyze the emergence of new spatial figurations. It does so from the perspective of the experiences of individuals in their changing belonging to different groupings at different times. [42]

Marian BURCHARDT (2021) provides a similar illustration for ethnography in his contribution on "Creating Religious Spaces in Cape Town, Barcelona and Montreal." Comparing those three cities, he shows how ethnography can be used to explore how religious change and the refiguration of spaces are mutually shaped in different contexts. In doing so, he is able to show how global social processes—such as religious change—play out differently in the three localities. BURCHARDT argues that comparative methodologies in studies on urban religion are indispensable in order to reveal both global structural forces and cultural differences. [43]

Jannis HERGESELL (2021) concludes the thematic issue by reflecting on the "Re-Figuration of Spaces as Long-Term Social Change." He argues that historical-comparative methodology is a classical sociological approach aiming at understanding the differences and similarities of transformation processes in the present by reconstructing their past. He systematizes these methodological approaches and discusses the methodological potential of historical-comparative methodology for research on the refiguration of spaces. He starts by discussing existing preliminary historical-sociological work on comparison strategies for

analyzing cross-cultural, large-scale social change. Then, he illustrates how the refiguration of spaces can be understood as long-term social change. On this basis, HERGESELL outlines a universally comparative, causal-analytic, historical-sociological methodology of research on the refiguration of spaces. [44]

In summary, the contributions to this *FQS* thematic issue focus either on the methodological challenges the refiguration of spaces poses for traditional ways of doing comparison, or suggest how established methodologies and research designs can be adapted in order to analyze the refiguration of space. Most of the methodological challenges identified by the authors have been long known in social science discourse. The refiguration of spaces simply brings them to light, as they cannot be ignored anymore, just because it is inconvenient for research practice. At the same time, due to the complex nature of the phenomenon under question, research methodologies will have to be further refined in future years in order to better grasp micro-macro interactions across various layers of time and to be potentially able not only to describe spatial transformations but also to explain them. [45]

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