

Methodology of IR research

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Why methodology?

- Connects the **abstract theoretical** concepts with **practical empirical evidence** – allows us to generalize assumptions based in concrete empirical data
 - Does not matter if we aim to **test a theory** or **analyze a certain problem**

How to choose a methodology?

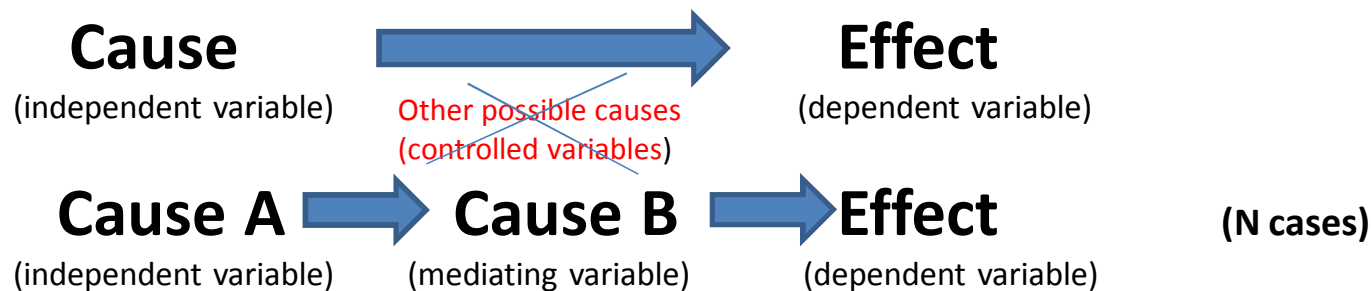
- According to our ontological and epistemological foundations
 - **What are we focusing on and how are we approaching it?** Individual, structure? Ideational or material factor?
 - **How are we working with theories?** Are we just testing them, are we trying to formulate a new one? Are we focusing in depth on single case?
 - Are we focusing on a *static image* or an *ongoing process*? Etc.

What methodology?

- Quantitative vs. qualitative?
- What type of **qualitative methodology**?
 - Single case study
 - Comparative case study
 - Biography/ethnography
 - Discourse analysis/grounded theory
- **Explanatory or interpretative** research?

Explanation vs. interpretation

- **Explanation** – deciphers causality in reality
 - Causes and effects located, link proven. Comparison essential
 - Similar to natural sciences (experiment) – essential is the **replicability**. We define variables and look for patterns of change.



E.g. Hypothesis – democracy leads to peace. We test the hypothesis by analyzing N studies, if it works/fits, the hypothesis is verified and we have confirmed/created a theory. We can thus use the outcomes to predict the future.

Interpretation

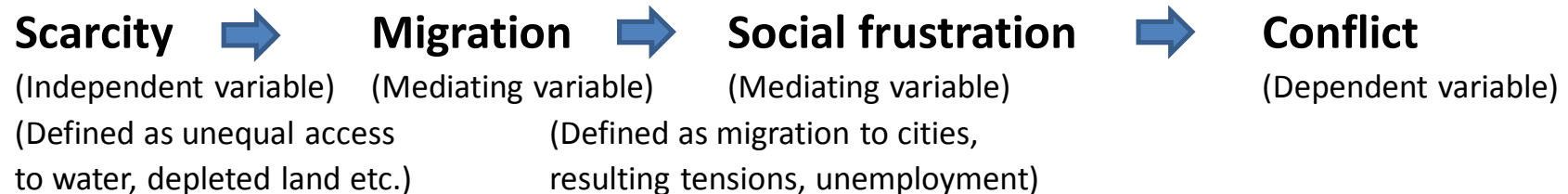
- Aim is to better **understand** event or phenomena **rather than generalize**
- Understands the case in its historical/cultural/social **context** – subjective rather than objective, methods can be to an extent vague, not well suited to testing theories
 - Focuses on **constitutive** rather than **causal** mechanisms (typologies, ideal types etc.)

Case study

- **Case** = defined historical episode or its aspect (limited by timeframe and issues)
 - Good case defined by significance, relevance, complexity, alternative views, attractive style
- **Case-study** = detailed and contextual analysis of the case(s)
 - **Intrinsic** – to understand **the case itself**, without the need for generalization; does a concrete concept work in that case?
 - **Instrumental** – testing a hypothesis (theory) by a single case
 - Most probable – to *challenge* the theory (if case fails, the theory too)
 - Least probable case – to *confirm* the theory
 - I.e. Stimulus-response theory and DPRK-US relations?
- **Comparative case study** – illustrates/confirms validity of a theory by multiple cases, creates new theories or *contrasts contexts*
 - **Method of agreement** (similarities in independent variables – we focus on dependent variable – i.e. why did Japan, Russia and New Zealand withdrew from the Kyoto Protocol?) or **method of difference** (similar dependent variable, we are looking for the key independent variable – i.e. why are there so big differences in political systems of Kazakhstan, Kyrgyzstan and Uzbekistan?).

Instrumental case study

- T. Homer-Dixon's argument that 'environmental scarcity leads to conflict'
 - Scarcity (**independent variable**) defined as 'renewable resources through environmental degradation'. Conflict (**dependent variable**) as 'violent intra and interstate'
 - Social effects (**mediating variable**) an outcomes of scarcity
 - i.e. limited agricultural productivity, migration etc.



Interpretative case study

- Hines (2013): Has China socialized to the peaceful norms of ASEAN Regional Forum (ARF)?
 - Aim: to identify and **understand one case**, without the need to generalize
 - **Socialization** a product of persuasion, when 3 requisites are met: pre-existing belief, perceived legitimacy and individual characteristics. If these are fulfilled, the state will switch from instrumental to appropriate behavior – China only in some cases
- **Comparative case study** – Lynch (2006): democratization is done through **socialization to international norms**
 - Focuses on Taiwan, Thailand and China and finds out that in Taiwan and Thailand, the assumption holds, but in China it does not, because it would 'lead to China's permanent decentering in the world'. This could work against socialization in Asia