Qualitative Comparative Analysis in Comparative Politics
"Forschungsprojekt"

19.04.2018

instructor: Prof. Ingo Rohlfing, PhD
office hours: Wednesday, 10am-12; by appointment; open door policy
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first session: 13.04.2018
last session: 06.07.2018
room: Hörsaal Forschungsinstitut, Gottfried-Keller-Str. 6
time: varies; see time schedule below

Please also regularly check the CCCP information on teaching on the internet:
http://www.cccp.uni-koeln.de/en/public/teaching/

The course introduces participants to the basis, mechanics and application of Qualitative Comparative Analysis (QCA) in Comparative Politics. QCA is based on the idea of set relations and can be an alternative to statistics when it comes to the analysis of a medium or large number of cases. The course starts with the foundation of QCA, which are the notion of a 'set' and different sorts of necessary and sufficient relationships between one or multiple sets. You are then taken through all the steps required for performing a QCA:
- the choice of potential causes of an outcome;
- their transformation, called calibration, into sets;
- the transformation of calibrated data into a truth table;
- the simplification of a truth table with an algorithm;
- the interpretation of the results

We will use a study by Hinterleitner et al. (2016) for illustration and reproduction. "Reproduction" means we will use the original data and try to produce the same results by rerunning the analysis with *RStudio* (see below).
- Hinterleitner, Markus, Fritz Sager and Thomann Eva (2016): The Politics of External Approval: Explaining the IMF's Evaluation of Austerity Programmes. *European Journal of Political Research* 55 (3): 549-567. http://dx.doi.org/10.1111/1475-6765.12142

At the end of the course, participants will have the required basic knowledge for evaluating the quality of published QCA studies and to perform a basic analysis using the software R.

Voluntary reading ahead of course
You can have a look at these two texts if you want to get a better idea of what QCA is.
- General intro to QCA: Marx, Axel, Benoît Rihoux and Charles Ragin (2014): The origins, development, and application of Qualitative Comparative Analysis: The first 25 years.

European Political Science Review 6 (1): 115-142.
http://journals.cambridge.org/abstract_S1755773912000318
- Summary of main elements of QCA: Thiem, Alrik (2017): Conducting Configurational Comparative Research with Qualitative Comparative Analysis. *American Journal of Evaluation* 38 (3): 420-433. http://doi.org/ 10.1177/1098214016673902

Topics and readings
13.04.18
10-11.30, Hörsaal Forschungsinstitut: Intro to QCA & basics of set theory I
- Schneider, Carsten Q. and Claudius Wagemann (2012): *Set-theoretic methods for the social sciences. A guide to Qualitative Comparative Analysis*. Cambridge: Cambridge University Press: section 1.1, 2, 3.

20.04.18
10-11.30, Hörsaal Forschungsinstitut: Basics of set theory II
- Schneider, Carsten Q. and Claudius Wagemann (2012): *Set-theoretic methods for the social sciences. A guide to Qualitative Comparative Analysis*. Cambridge: Cambridge University Press: chapter 2, 3.
- Setting up RStudio and getting it running for next session

27.04.18
10-11.30, 12-13.30, Hörsaal Forschungsinstitut: Choice of conditions & calibration I
- Amenta, Edwin and Jane D. Poulsen (1994): Where to begin: A survey of five approaches to selecting independent variables for Qualitative Comparative Analysis. *Sociological Methods & Research* 23 (1): 22-53.
- Schneider, Carsten Q. and Claudius Wagemann (2012): *Set-theoretic methods for the social sciences. A guide to Qualitative Comparative Analysis*. Cambridge: Cambridge University Press: chapter 2, 3.

04.05.18
10-11.30, Hörsaal Forschungsinstitut: Calibration II
- Schneider, Carsten Q. and Claudius Wagemann (2012): *Set-theoretic methods for the social sciences. A guide to Qualitative Comparative Analysis*. Cambridge: Cambridge University Press: section 1.2.

11.05.18
10-11.30, 12-13.30, Hörsaal Forschungsinstitut: Necessity
- Schneider, Carsten Q. and Claudius Wagemann (2012): *Set-theoretic methods for the social sciences. A guide to Qualitative Comparative Analysis*. Cambridge: Cambridge University Press: section 3.2, 5.4, 5.5.

18.05.18
10-11.30, Hörsaal Forschungsinstitut: Construction of truth table
- Schneider, Carsten Q. and Claudius Wagemann (2012): *Set-theoretic methods for the social sciences. A guide to Qualitative Comparative Analysis*. Cambridge: Cambridge University Press: chap. 4, 6, 7.

25.05.18: No course (Pfingstwoche)

01.06.18
10-11.30, Hörsaal Forschungsinstitut: Construction of truth table II
- Schneider, Carsten Q. and Claudius Wagemann (2012): *Set-theoretic methods for the social sciences. A guide to Qualitative Comparative Analysis*. Cambridge: Cambridge University Press: chap. 4, 6, 7.

08.06.18: No course

15.06.18
10-11.30, Hörsaal Forschungsinstitut: Minimization I
- Schneider, Carsten Q. and Claudius Wagemann (2012): *Set-theoretic methods for the social sciences. A guide to Qualitative Comparative Analysis*. Cambridge: Cambridge University Press: chap. 8.

22.06.18
10-11.30, 12-13.30, Hörsaal Forschungsinstitut: Minimization II
- Schneider, Carsten Q. and Claudius Wagemann (2012): *Set-theoretic methods for the social sciences. A guide to Qualitative Comparative Analysis*. Cambridge: Cambridge University Press: chap. 8.

29.06.18: No course

06.07.18
10-11.30, 12-13.30, Hörsaal Forschungsinstitut: Minimization III & What makes a good QCA study
- Schneider, Carsten Q. and Claudius Wagemann (2012): *Set-theoretic methods for the social sciences. A guide to Qualitative Comparative Analysis*. Cambridge: Cambridge University Press: chap. 5.2, 5.3, 8

Course requirements
Prior exposure to QCA and qualitative methods is recommended, but not required.
Participants are kindly requested to use their own laptops because we do not have access to a computer lab. It is necessary to install the current free versions of:
- R: https://cran.rstudio.com/
- RStudio: https://www.rstudio.com/products/rstudio/download/

There are plenty of free instructions on using R and RStudio. You can access two short intros here: https://www.dropbox.com/sh/1k3c6xp6wm827ic/AACilF1PkyTBz6NIPB3k8VuBa?dl=0
See also the "Resources" on the RStudio website. More information will be shared at the beginning of the course.

Don't panic if you are not familiar with R or have never before done an analysis by writing code. One goal of the course is to make you used to doing a QCA study based on R code.

Exam and grading

Early during the course, participants are required to choose a published QCA study from a set of three studies (they can be found on ILIAS). The mid-term assignments (small assignments to be done during the term) concern the following topics:

- review and summary of the chosen study;
- analysis of necessity;
- generation of truth table;
- minimization of truth table.

Each assignment should be about 5 pages written text plus R code (the code does not count against the page number) that a participant used to reproduce the chosen study. The code template for the reproduction will be made available to participants during the course in relation with the Hinterleitner study and before assignments are due. The final paper is the comprehensive review and reproduction of an article assigned by me. Each mid-term assignment is returned with comments within one week after the deadline.

If a paper is submitted two days late (up to 48 hours after the deadline), I will deduct one grade from the grade you would have gotten if you had submitted the assignment in time. A 1.0 then will be a 1.3, a 1.3 will be a 1.7 and so on. If you submit more than 48h late, the grade for the assignment is 5.0. The course is passed if the final grade is at least a 4.0.

The first four papers are weighted with 15%, the final paper is weighted with 40%. The weights apply to the points received for each assignment, not the grade.

deadline for submission	topic	weight
04.05.2018, 10am	review and summary	15%
18.05.2018, 10am	necessity analysis	15%
15.06.2018, 10am	truth table generation	15%
13.07.2018, 10am	minimization	15%
15.09.2018, 10am	comprehensive review	40%