

Case selection and generalization

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Researchers usually want to generalize their findings and be able to transfer them to as many other social settings as possible. For this purpose, it would be preferable to analyze social reality as a whole—in the terminology of qualitative research, that would require investigating the entire *field*; in the terminology of quantitative research, that would imply analyzing the whole *population*. However, analyses of the whole population are almost never possible in research practice—because it is often unclear what the population is and because the social phenomenon of interest for most research questions in the social sciences is so extensive in terms of time, space, and the number of cases that it is virtually impossible to include all cases within the scope of the phenomenon, especially since the entire research project is limited by time and resources (Thierbach et al. 2020).

As a result, researchers can practically never examine the social reality as a whole—even when working in teams—but rather only parts of it, which is why *cases* have to be *sampled*—sometimes scholars also talk about *selecting* cases. The criteria for selecting cases greatly influences whether and to what extent the findings of a study can be generalized and transferred to other contexts (Thierbach et al. 2020).

Qualitative and quantitative researchers agree that what is referred to as *convenience sampling* (also known as *opportunity* or *availability sampling*) should be avoided whenever possible, except to explore a phenomenon that is difficult to access. An example for convenience sampling from qualitative research is snowball sampling, while examples from quantitative research include street surveys and most analyses of digital, administrative, and other process-generated data. These sampling processes have in common that researchers do systematically select cases but rather choose cases that are easy to access. Consequently, it is almost never possible to generalize results when convenience sampling was applied (Thierbach et al. 2020). Against this background, social scientists have developed various sampling strategies, which differ concerning the reasoning behind the principles of selecting cases and to what extent generalizations are actually feasible.

1 Requirements for selecting cases

Before we explain the strategies and criteria for selecting cases in detail, it should be noted that the questions underlying an investigation are what primarily serve as the starting point to choose adequate cases (Akremi 2022). In this context, at the beginning of a research project, researchers need to define both the relevant premises for selecting cases—how they understand both cases and the research process as a whole.

1.1 Defining the case

The first step of and necessary requirement for case selection is always to define cases. Researchers have to clarify multiple points for their specific study:

1. *What is the population or the field?* Generally speaking, the population either describes what is being investigated (*study population*) or the group to which the findings of a study are generalized (*target population*). The two are not necessarily congruent—for example, the resident population of a country is not the same as the legally registered population or as the persons who have a phone number with the relevant country code. Researchers need to define the population substantially, temporally, and spatially. Usually, none of these dimensions are clear-cut. Think of, for example, social media, transnational migration or supply chains.
2. *What is a case?* Researchers do not only have to define the population but also cases substantially, temporally, and spatially (see Christmann/Baur in this handbook), and in doing so, they need to keep in mind that with “cases” they might not always mean “people” but e.g. events, situations, processes, organizations, cities, nations, etc. In addition, cases can change (for instance, over time) (Abbott 2001). Therefore, it is necessary to clarify how exactly a case can be delineated, what is part of the case (and what not) based on the state-of-research, whether and how the case can be empirically differentiated from other cases, and whether it is empirically entangled with other cases that might influence it (Mayring 2016: 41 et seqq.). Furthermore, researchers need to keep in mind that cases can have subcases (also known as *subunits*) that are nested inside one another (Akremi 2022; Merkens 2015: 292). For example, newspapers are made up of articles, which in turn are made up of sentences, which in turn are made up of words. Nations are often composed of different regions and cities, which are composed of neighborhoods, which are composed of homes, which are composed of multiple families. Neighborhoods consist of stakeholders, residents, networks, events, activities, media coverage, etc. Which cases researchers should ideally select during sampling depends on which of these many aspects of a case is relevant to the research question. They have to decide which type of stakeholders (artists, district politicians), residents (Germans, migrants), events (group meetings, network meetings), media coverage (local press, national reporting) etc. should be included in the study. Researchers also have to determine which specific units they have to collect data on: in other words, which specific individuals from the category of artists or residents, which group meetings, etc. should be selected. It is important to keep in mind that the units of analysis and the units of data

collection are not always the same. For example, individuals (unit of data collection) can interview properties of the group (unit of analysis).

3. *What are the relevant aspects and aspect relationships?* The topics of investigation stipulate what the objects of study should be, which aspects of those objects should be studied, and which relationships between those aspects should be considered. These then have to be translated by means of theoretical assumptions so that they can be measured in empirical studies in the first place—in quantitative research terms, this is referred to as operationalization. This translation process culminates in concrete data collection and analysis methods, as well as *variables* and *categories* intended to describe the aspects and aspect relationships relevant to the research question.
4. *How is the population related to the relevant aspects?* When defining a population and selecting a case, it is important to pay attention to whether all aspects and aspect relationships of the research questions can be studied in the potential case. If researchers do not only want to describe and understand a social phenomenon but also explain it, they have to additionally apply causal analysis methods. In the latter case, they have to keep in mind that all variables used to delineate the population can no longer be considered as causes or effects in causal analysis (Ragin 2000). Hence, if you define the population as “German citizens living in Germany,” you can no longer examine whether nationality, territory, or residency status have an influence on the phenomenon of interest because the variables were set as constant when defining the population: non-Germans, Germans living in other countries, immigrants, tourists, and homeless people are automatically excluded from the population and will therefore not be part of the sample. As no data will be collected on them, it will be impossible to compare them with German citizens living in Germany. The more variables that are used to define the population, the less possible it is to translate or generalize the results to contexts other than the study population (Ragin 2000).

There is no general answer to the above questions. Rather, researchers have to answer them with regard to a specific research question and will only be able to answer them by making numerous theoretical assumptions. This is particularly true within the scope of studies in socio-spatial research because researchers do not only have to decide if their cases are individuals, organizations, events, processes, etc., but they also have to define the spatial dimension of their cases (which is often ignored in other studies), and concerning this dimension, case selection has to be just as well founded as for the other dimensions.

1.2 Ways of organizing the research process: linearity vs. iteration

In a next step, researchers have to decide how to organize their research process. In general, there are two ways to organize the research process:

1. *Linear research process:* In many research traditions—such as qualitative content analyses—the research process is organized linearly: Researchers start with developing the research question based on their prior knowledge and state-of-research in academic literature. They then embed their research question in a social theory and use

this as a basis to develop a research design, sample cases, collect the data, prepare the data, evaluate the data, and use the data to formulate generalizations. While qualitative researchers can choose, if they want to organize the research process linearly, in quantitative research, linearity is mandatory since—following the logic of the statistical inference—sampling *must* always come *before* data collection and analysis. According to the principles of inferential statistics, the sampling strategy can no longer be changed after random sampling (e.g., replacing the selected cases with other cases is not allowed). This becomes problematic if it turns out in later stages of the research process that data collection techniques need to be adapted as the initial hypotheses, measuring tools cannot or only partially can measure the relevant aspects of the social phenomenon in question or when new questions arise.

2. *Iterative research process*: Therefore, many qualitative methods are characterized by a much more open-ended approach, especially in the initial phase of the research process (Lamnek 2005: 21 et seq.). In particular, defining the research question becomes part of the research process, and researchers start by exploring their research subject in exploratory fieldwork. Only after acquiring more in-depth knowledge of the empirical field do they define initial cases for the investigation in detail. In order to address the challenges of organizing the research process in this way, Glaser and Strauss (1967) developed grounded theory and recommended carrying out the further sampling iteratively: In the case of “theoretical sampling,” researchers alternate between sampling, collecting data, and analyzing data. Based on the analysis of prior cases, in later stages of the research process, additional cases are selected because they will provide important new insights for the subsequent theoretical and empirical work. Therefore, which cases are selected and which data are collected are determined by the potential of advances in theory development. Samples can be expanded as needed and are only considered complete when the study is “theoretically saturated” (Lamnek 2005: 187 et seq.; Flick 2017: 154 et seq.): that is to say, when no new results and concepts emerge. This makes it possible to continuously adapt the research design to the research question, thus maximizing the theoretical output while at the same time minimizing the fieldwork required for that output.

1.3 Example: Spatial pioneers in urban areas

We will illustrate the considerations from the sections above by using Christmann’s (2013, 2014) study on “spatial pioneers in urban areas” as an example:

1. *Research question*: The overarching question of Christmann’s (2013) study was how spatial transformations take place in socially disadvantaged neighborhoods with a strong negative image. Or to be more precise: how can communicative processes of spatial (re)construction be described there from a micro perspective. Christmann centered her study around certain actors she designated as “spatial pioneers,” whom she characterized by—in pursuit of their life plans—having arrived in the neighborhoods to take advantage of spatial opportunity structures. She investigated how spatial pioneers conceived their neighborhoods in a new light within the context of their spatial actions, how they developed new points of view and negotiated them in com-

municative processes with others, how they gained influence over discourses and knowledge systems, how they coordinated their actions and implemented projects, how they incorporated physical-material objects, and how they promoted transformation processes in turn.

2. Rhetoric approach: The (spatial) theoretical starting point for Christmann's considerations was the fact that spaces are reconstructed in everyday processes of action and interaction between actors, which can create new or modify existing spatial dimensions at times and further stabilize those dimensions at others. The fundamental idea behind her study was that it is worth analyzing spatial transformations within a period of decades from a micro-perspective to shed light on discursive and communicative reconstruction processes. Christmann (2016) furthered Keller's et al. (2013) theory of communicative constructivism towards the communicative spatial (re)construction approach.
3. Research design: Because such a dynamic and complex object of investigation requires a complex research design in terms of the methodology, Christmann (2014) also developed the methodological approach of "ethnographic discourse analysis" which combines focused ethnography (Knoblauch 2001) with the sociological approach towards discourse analysis (Keller 2007).
4. Cases, units of collection and analysis: On the basis of both her theoretical and methodological reflections, Christmann decided that for the study, cases were neighborhoods, and she purposefully selected the neighborhoods Moabit (Berlin, Germany) and Wilhelmsburg (Hamburg, Germany). These neighborhoods have in common that policy-makers consider them as particularly needing development, even though upward trends have been reported for them in the last several decades. In addition, both neighborhoods boast numerous local media outlets, host vibrant neighborhoods-related discourses, and are home to many different spatial pioneering initiatives with diverse activities. In Christmann's study, the units of analysis consisted of (a) spatial pioneers, including social entrepreneurs (e.g., people who find jobs for youth), the self-employed (e.g., owners of bookstores or tea shops), freelancers (e.g., artists, creatives), and representatives of social organizations (e.g., social workers); (b) group and network meetings of spatial pioneering initiatives; (c) media coverage in the local press. Additional spatial pioneering initiatives identified by the research team were added to the study throughout the research process.

2 Random sampling, statistical inference, and associated problems

Once the research questions, theoretical background, ways of organizing the research process and what the cases are have been clarified, researchers can begin with the actual case selection. Three main principles of case selection can be distinguished: random sampling, purposeful sampling of multiple cases, and single case studies.

Random sampling is used not only in quantitative research but also—even though rarely (and for a good reason)—in qualitative research. Nevertheless, it is necessary to address random sampling because many researchers either first associate, or only associate, *case selection* with *random sampling* and *generalization* with *statistical inference*. Ran-

dom sampling and statistical inference are therefore reference points for all debates on case selection and generalization not only in quantitative but also in qualitative research. Consequently, in order to differentiate between random sampling and other sampling techniques, it is necessary to first understand the logic of random sampling and any problems associated with them.

Specifically, after having clarified the points above, when applying the principle of random sampling, researchers work through the following steps (in this order):

1. They calculate the ideal number of cases in the random sample with the help of probability theory.
2. They randomly select cases from the population. *Random* means that every case in the population has a predictable chance of ending up in the sample—this chance needs to be calculable *before* drawing the sample.
3. They collect data on the selected cases, prepare that data, and then use *descriptive* statistics to analyze the data.
4. They generalize the results gained by using descriptive statistics to the population by using *inferential* statistics. Researchers express the degree of certainty of their generalization using *significance levels* (in *statistical tests*, which are also called *significance tests* or *hypothesis testing*) or *confidence levels* (in *confidence intervals*).

In order to be able to apply this very abstract model in research practice, quantitative researchers have developed concrete methods for random sampling, which provide specific recommendations depending on the spatial contexts, type of data, and data collection method. For example, content analyses, face-to-face surveys, telephone surveys, postal surveys, online surveys, etc. Because such *good-practice models* are extremely context dependent and are constantly being modified due to social changes, the recommendations for a certain type of random sampling should be consulted in a recently published handbook of methods from the relevant country of investigation.

There are several key characteristics of random sampling that are rarely discussed but often lead to problems in research practice (Thierbach et al. 2020):

1. *Linearity*: As mentioned above, random sampling requires a linear research process.
2. *Population and causality*: As pointed out earlier, all variables that are used to define the population can no longer be studied in terms of their causal effects.
3. *Probability theory vs. social theory*: For any principle of case selection, researchers have to make theoretical assumptions in order to be able to select and generalize cases. If these assumptions are incorrect, then the generalization is also invalid. This is also true for random sampling: statistical inference is by no means “objective” either in the sense that its results do not have to be interpreted. On the contrary, there are several different statistical theories on what *probability* means and how the results of inferential statistics should be interpreted. Using statistical inference merely means that researchers rely more on probability theory than on social theory in terms of justifying their case selection. Over the last few years, however, the logic underlying probability theory has been increasingly threatened by increasing *non-response errors* and the increasing difficulty in defining the study population. In the past, a popula-

tion was the “resident population of a nation.” As a result of transnationalization and digitalization, it has become progressively unclear what *populations* are or could be.

4. *Need for a large sample size:* Random sampling requires a relatively large minimum sample size—typically ≥ 30 —as otherwise the probability of a random error would be too high to draw any meaningful conclusions based on the data. This makes random sampling impractical for many lines of qualitative research (e.g., social hermeneutics or biographical research) because data collection and data analysis would exceed the resources allotted for the project. Frequently, a sample size of $n \geq 30$ would not be possible regardless of the resources scholars have because not enough cases exist in social reality: for instance, in the case of rare incidents (e.g., the Covid-19 Pandemic) or phenomena at the macro level (e.g., the EU has only 27 member states).
5. *Quantity vs. quality:* As a rule, if data are collected for a large number of cases, the downside is that less information can be collected for each case and researchers do not have the time and the data required for an in-depth analysis. Such in-depth analyses are absolutely necessary if the subject areas change very quickly or if the type of research phenomenon is not yet known (Kelle 2017).

3 Purposeful sampling of multiple cases

In order to resolve the problems inherent in random sampling, qualitative researchers have developed a wide range of techniques for *theory-based sampling* (also known as *purposeful sampling*), which use social theories (instead of probability theories) in order to select cases and generalize and which are also suited for small case numbers, allowing for a more in-depth analysis. As is the case for random sampling, in theory-based sampling, researchers use theoretical considerations to develop their sampling strategy. However, they use *social* theory instead of *probability* theory. Therefore, the generalization strategies are not based on statistical arguments but rather on sociological reasoning (Baur et al. 2018).

3.1 Methods of agreement and difference

If multiple cases are selected, two basic sampling principles exist (Sept/Baur 2020):

1. *Method of Difference* (also known as *most similar cases design*, MSCD): Researchers select cases that are as similar as possible (with regard to the research question). For example, they might select only typical or only atypical cases (Behnke et al. 2010: 204 et seqq.), in order to delve deeper into the cases’ structures (Flick 2017: 170 et seqq.). If researchers want to do causal analysis, a most similar cases design enables them to identify potential necessary conditions (Baur 2018: 308 et seqq.). For example, the authors of the study on the “Intrinsic Logic of Cities” (Frank et al. 2014) applied a most similar cases design to select four cities that resembled each other in terms of their size, density, heterogeneity, and structural conditions and that were all affected equally by the crisis of the 1970s.

2. *Method of Agreement* (also known as *most different cases design*, MDCCD): Researchers select cases that are as different as possible (with regard to the research question) in order to measure the full breadth of the phenomenon (Behnke et al. 2010: 204 et seqq.). If researchers want to do causal analysis, a most different cases design allows them to identify potential sufficient conditions (Baur 2018: 308 et seqq.). In the study on the “Intrinsic Logic of Cities” (Frank et al. 2014), in addition to the method of difference (see above), also the method of agreement was applied: In order to study the influence of the national context on urban development, the authors selected two German cities (Dortmund, Frankfurt) and two British cities (Birmingham, Glasgow). Based on prior knowledge, in order to analyze how urban practices and the economy are entangled over time, two cities were selected that had succeeded in overcoming the structural transformation of the 1970s (Frankfurt, Glasgow) and two were selected that had failed to overcome the same transformation (Dortmund, Birmingham).

As illustrated in this example, the methods of difference and agreement can be combined when selecting cases. Another example of combining these principles is *quota sampling*, which—contrary to popular belief—is not a random sampling technique but rather a variation of theory-based selection (Thierbach et al. 2020).

3.2 Criteria for selecting a specific case

When purposefully sampling multiple cases, it is necessary to determine to what extent the selected cases can be compared with one another in the first place, how they fit together, how similar they are, or if we are comparing “apples” and “oranges” (Akremi 2022). If we are comparing “apples” and “oranges,” then we are dealing with far too many basic structural differences.

Therefore, it is advisable to assess the comparability of the cases in a separate step in the actual research process. For example, one sub-element of the study on the “Intrinsic Logic of Cities” (Frank et al. 2014) consisted of reconstructing the cities’ economic development in the course of history. This process-oriented analysis revealed that several original assumptions—concerning e.g. the timing, course and results of economic restructuring—on which the case selection was based could not be upheld when empirically scrutinized (Baur/Hering 2017). In this qualitative study, the results of process-oriented analysis not only allowed for a deeper understanding of the cases and encouraged methodological reflection but also provided the bases for a differentiated empirically-grounded theory-building.

Furthermore, it is recommendable to keep as many factors as possible as constant as possible and to concentrate on as few dimensions for comparison as possible. Here it is useful to think about the research questions with their aspects and aspect relationships and to ask what is of most interest for the specific study. For example, the authors of the study on the intrinsic logic of cities were interested in whether and how certain social practices are reproduced beyond crises or whether cities have to be reoriented in the wake of a crisis—this is precisely why they selected cities that were affected by the same crisis. By concentrating on these questions, they were able to demonstrate that the

intrinsic logic of a city does in fact influence how a city reacts to and overcomes crises (Baur/Hering 2017).

4 Single case studies

In a single case study, as the name suggests, only a single, yet particularly interesting, case is selected (Lamnek/Krell 2016). Researchers aim to completely reconstruct the case with all its complexity and its whole context.

4.1 Potential categories underlying single case studies

There are several key categories which can typically be used as a basis for selecting single cases (Baur/Lamnek 2005: 241 et seqq.; Yin 2018) and that can also be applied to socio-spatial research (see Tab. 1).

Category	Example of an application in socio-spatial research with research question
Person, actor	Study on a significant architect such as Le Corbusier investigating how he influenced developments in the field of architecture
Group, setting	Study on "Urban Catalyst," a group of architects and planners in Berlin, to determine how they served as trailblazers for promoting the concept of temporary use in spatial planning
Network	Study on the "Climate Alliance" city network investigating how the network organizes its collaborative activities and works on urban environmental protection measures and reducing CO ₂ emissions
Organization, association	Study on an association of cities and municipalities exploring how the association represents the interests of local communities in digitalized cities
City district, neighborhood	Study on the Leipzig-Mitte district to answer the question of how the first innovative temporary use of vacant space was made possible and legal
City (as a whole)	Study on the German city of Frankfurt looking into how to describe its intrinsic logic
Region	Study on the Rhine-Ruhr metropolitan region in Germany intended to reconstruct its economic development
Nation	Study on Great Britain and its urban planning policies
Supranational union	Study on the European Parliament examining how rural development policies are negotiated
Process, procedure	Study on deindustrialization in the Rust Belt and how this took place in the oldest and largest industrial regions of the United States

Tab. 1: Potential categories underlying single case studies. | © Author's own diagram

4.2 Criteria for selecting a specific case

If only one case is being studied, this means that the quality of the entire study depends greatly on the extent to which this case is suitable for carrying out the planned investigation. Therefore, researchers should take particular care when selecting this case. The following questions and deliberations can help during the case selection process (and should ideally be made adequately transparent in a subsequent publication):

1. *Determining whether the case is suitable for the research questions:* To what extent is the case suitable for addressing all research questions in the study together with their aspects and relationships? Does the case have any particular advantages for the research project? Does the case have any specific disadvantages or limitations? How do the advantages compare to the disadvantages?
2. *Determining whether the case is suitable for the theories underlying the study and the selected methods:* Do the theoretical assumptions of the study apply to the case? Can the selected methods be used for the case?
3. *Weighing the case against other potential cases:* Which other cases have been found that could also be suitable for the study? Are the characteristics of these cases known (or could they be studied in advance)? Which of the different potential cases is particularly compelling with regard to the specific study?
4. *Categorizing the case within the general context of the phenomenon being studied:* Based on research to date, what does the case represent within the context of the phenomenon? If the study examines an extended process (e.g., an innovation process), does the case only apply to part of the process or does it cover the entire process? How typical is the case within the context of the phenomenon? Does it represent frequent cases of this type, rare cases, or extreme cases?
5. *Categorizing the case within its specific context:* How can the context of the case (see Christmann/Baur in this handbook) be described? In other words, what are the characteristics of the case context according to existing knowledge (e.g., what are the key characteristics of the national, regional, historical, cultural, economic, political, social environment) and to what extent could they potentially influence the phenomenon being studied?

4.3 Case selection and generalization

While some cases are of interest in and of themselves (*intrinsic case studies*), *instrumental case studies* are aimed at generalization. Various strategies are available for this purpose (Baur/Lamnek 2005; Yin 2018):

1. *External case comparison:* The case is compared to other cases—for example, from specialized literature—or by using sociological theory as a synopsis of earlier empirical studies. It is also possible to iterate between single case analyses and case comparisons in mixed-methods studies. This generalization strategy depends on how the specific case was selected. It is particularly helpful to select (a) hypothesis-testing cases or critical cases that theoretically should not exist but that apparently do from

an empirical standpoint; (b) extreme or unique cases that are especially suited for analyzing firmly established routines and norms; and (c) typical cases that are suited for detailed analyses.

2. *Internal case comparisons:* Alternatively, based on the observation described in Section 2.1 that cases are often made up of subcases, it is possible to make use of systematic variation within the case to identify typical patterns that can be used for the purpose of generalization.

5 Case selection as the key determinant for generalization

In summary, case selection is a key step for the overall study results and for determining if and how the findings can be generalized. Frequently, researchers do not devote enough attention to this step in both research practice and in the literature on qualitative methods. In particular, qualitative researchers have spent far too many decades justifying why random sampling is generally not appropriate for qualitative research instead of developing more suitable alternatives. However, as demonstrated above, this is crucial because random sampling has specific weak points, which largely apply not only to qualitative but also quantitative research.

This includes the fact that random sampling requires a linear research process, while in spatial research, it is often unclear what the cases and populations are and how they can be differentiated from one another. Almost all of the definitions of populations used in quantitative research (and many of those used in qualitative research) assume that populations can be clearly delineated territorially (as communities, regions, or nations) and consist of immobile cases (permanent residents). Because this assumption often does not hold true in spatial research, the entire concept of generalization also falls short. Although critics of methodological nationalism have referenced this problem for some time now, they have not offered any viable solutions.

This is compounded by the fact that—if the sampling technique practiced in actual research is closely scrutinized—quantitative research practically never uses only random sampling but rather tends to combine random sampling with single or multiple case analyses: For example, if the “residents of the Federal Republic of Germany” are defined as the population for the analysis, from the point of view of sampling theory, this constitutes a single case. However, the reason why this case is being analyzed and not, let’s say, the “residents of Samoa,” is virtually never justified by quantitative researchers, although single case analyses offer a useful set of tools for this purpose.

In addition to thinking about populations, another research gap concerning case selection in qualitative spatial research is the need to develop practical guidelines for selecting specific cases based on the abstract recommendations derived from the principles of purposeful sampling. In this regard, quantitative research could serve as a role model, as quantitative researchers have developed specific sampling methods based on the abstract random sampling techniques. For Germany, for example, researchers can use random-route sampling for face-to-face surveys or the Gabler-Häder design for telephone surveys. These sampling strategies provide precise instructions regarding which decisions should be made when in the sampling process, which implications those deci-

sions have, and where there are standardized operations available for the case selection process.

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