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# Historical Political Economy: Past, Present, and Future

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## Keywords

historical political economy, legacies, persistence, history, causal inference, formal theory

## Abstract

A recent wave of research in political science examines the past using statistical methods for causal inference and formal theory—a field widely known as historical political economy (HPE). We examine the development of this field. Our survey reveals three common uses of history in HPE: understanding the past for its own sake, using history as a way to understand the present, and using history as a setting to explore theoretical conjectures. We present important work in each area and discuss trade-offs of each approach. We further identify key practical and analytical challenges for scholars of HPE, including the accessibility of data that do exist and obstacles to inference when they do not. Looking to the future, we see improved training for scholars entering the field, a heightened focus on the accumulation of knowledge, and greater attention to underexplored topics such as race, gender, ethnicity, and climate change.

## INTRODUCTION

History has traditionally played an important role in political science. Historical cases sit at the center of foundational studies of such diverse topics as regime type (Moore 1966), social order (Huntington 1968), revolution (Skocpol 1979), state formation (Levi 1988), and utopian policies (Scott 1998). Drawing methodological insight from sociology as well as political science (Mahoney 2004), this style of research continues to inform the way we think about politics.

Over the past decade, a complementary mode of historical research has gained prominence. This new wave of scholarship—often described as historical political economy (HPE)—spans not only the traditional subfields of political science but also economics, history, and sociology. What unites HPE is methodological approach. Whereas comparative historical research draws on history in a more descriptive and broadly comparative manner, work in HPE is predominantly quantitative, often focusing on a single country. Rather than studying the multiple and often contingent causes of some outcome, HPE typically seeks to isolate the causal effect of a specific factor using quasi-experimental methods. When HPE emphasizes theory, that theory is often articulated as a formal game-theoretic model.

HPE as a field has developed in parallel with the credibility “revolution” in the empirical social sciences (Angrist & Pischke 2010). Taking advantage of various design-based methods, scholars in HPE exploit variation across subnational units or individuals to improve the internal validity of their findings. This new wave of historical research often entails the creation of original data sets from archival sources and maps, enabled by technological developments such as optical character recognition, natural-language processing tools, and geographic information systems. Original data collection is also made possible by the increasing availability of digitized historical records in libraries and archives, sometimes accessible online.

HPE researchers now have their own journal (the *Journal of Historical Political Economy*) and Oxford Handbook (Jenkins & Rubin 2023); convene for regular panels and conferences; and publish the Broadstreet Blog, an interdisciplinary endeavor of political scientists, economists, historians, and sociologists. Editors have taken notice: since 2010, the *American Political Science Review*, the *American Journal of Political Science*, and the *Journal of Politics* alone have published nearly 130 articles that focus on “history” (a concept that we make more precise below) and use either statistical methods to evaluate falsifiable arguments or formal theory. As shown in **Figure 1**, the share of HPE in top journals more generally has risen dramatically over the past decade.

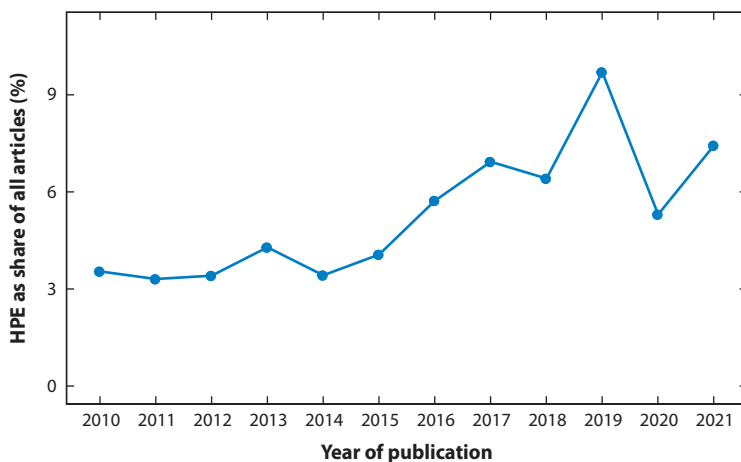
This article discusses the past, present, and future of HPE, as practiced in political science. We typologize HPE as work that seeks to understand the past for its own sake, that uses history as a way to understand the present, and that uses history as a setting to investigate important theoretical issues.<sup>1</sup> For analytical traction, we focus predominantly but not exclusively on work in comparative politics, which we show accounts for a clear majority of HPE articles in general-interest journals. We also discuss various practical and analytical challenges to the development of this new field, including graduate training, data collection and analysis, communication across disciplinary boundaries, and the accumulation of knowledge. We conclude by speculating on the future of the field.

## TYPES OF HISTORICAL POLITICAL ECONOMY

Surveying the field of historical political economy requires that we define both “historical” and “political economy.” As discussed above, we follow the field in adopting a methodological

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<sup>1</sup>In work that we discovered as this article was going to press, Cantoni & Yuchtman (2021) adopt a similar classification to survey work on historical natural experiments in economics. Such experiments feature prominently, for example, in the “new Russian economic history” reviewed by Zhuravskaya et al. (2023).



**Figure 1**

Historical political economy (HPE) articles as share of all articles published in the *American Political Science Review*, *American Journal of Political Science*, *British Journal of Political Science*, *Comparative Political Studies*, *Comparative Politics*, *Journal of Politics*, *Quarterly Journal of Political Science*, and *World Politics*, 2010–2021.

definition of the latter term, which we take to mean work that either uses formal theory or empirically tests falsifiable arguments using quantitative methods.<sup>2</sup> What it means to be “historical” is more subjective.

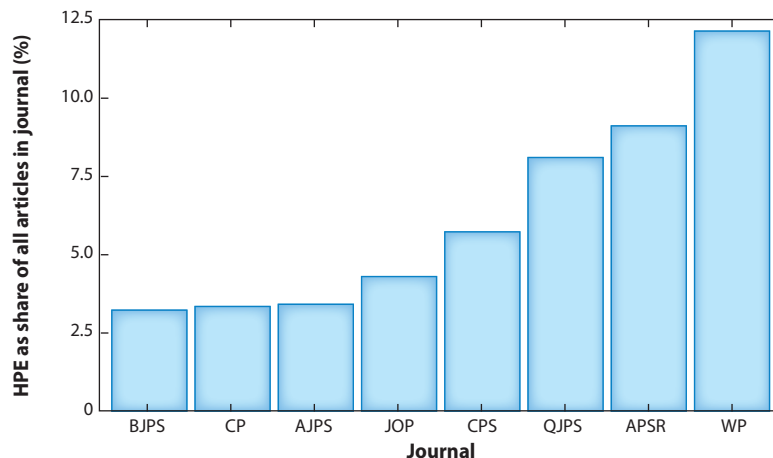
In a sense, all events are historical because they take place before they are studied. A more useful starting place is Gailmard’s (2021b, p. 73) conceptualization of historical events as those that “occurred in the past under temporally bounded social or institutional configurations no longer in operation in the place where the event occurred.” As Gailmard points out, this approach can be “unproductively constraining,” and whether a specific institution is no longer present is itself an empirical question (pp. 73–74).<sup>3</sup> Nonetheless, for our purposes, this conceptualization serves to focus attention on critical junctures in world history, where studies that focus on institutions and behavior prior to that moment can properly be understood as “historical.”

We therefore classify scholarship that uses the tools of political economy as HPE if it substantially or exclusively examines politics prior to 1945: the end of World War II, the onset of the Cold War, the moment when the Bretton Woods system came into effect, and the start of decolonization in Africa and Asia. This cutoff is admittedly conservative and at times arbitrary. It excludes, for example, research on the legacies of Communism in Eastern Europe (e.g., Wittenberg 2006, Pop-Eleches & Tucker 2017), though the recency of the Communist collapse implies that much scholarship in this area adopts methodologies distinct from those typical for HPE. We do make an exception for China, where important institutional changes occurred after the founding of the People’s Republic in 1949 and the Cultural Revolution from 1966 to 1976; several recent articles on the long-run consequences of repression during this period are plausibly classified as HPE.

This definition (and exception) in hand, we collected data on all articles published from 2010 to 2021 in eight top journals in political science: the *American Journal of Political Science* (*AJPS*), the

<sup>2</sup>This conservative definition is useful for distinguishing HPE from the qualitative case comparisons that characterized earlier work, but in principle, causal arguments can be evaluated using qualitative methods.

<sup>3</sup>Alternative conceptualizations may emphasize temporality within a given political process or view history as “what historians do” (Gailmard 2021b, p. 74).



**Figure 2**

Prevalence of historical political economy (HPE) research by journal relative to the total number of articles published in each journal, 2010–2021. Abbreviations: AJPS, *American Journal of Political Science*; APSR, *American Political Science Review*; BJPS, *British Journal of Political Science*; CP, *Comparative Politics*; CPS, *Comparative Political Studies*; JOP, *Journal of Politics*; QJPS, *Quarterly Journal of Political Science*; WP, *World Politics*.

*American Political Science Review* (APSR), the *British Journal of Political Science* (BJPS), *Comparative Political Studies* (CPS), *Comparative Politics*, the *Journal of Politics* (JOP), the *Quarterly Journal of Political Science* (QJPS), and *World Politics*. This selection of journals emphasizes comparative politics, where HPE has been particularly important, but our sample includes articles in other substantive areas of the discipline. We do not include books or, given the focus of this review, articles in the journals of other disciplines. In total, we identify 238 articles that examine historical events and use some combination of statistical and formal methods (11% include the latter). In absolute terms, the APSR (59 articles), the JOP (45 articles), and CPS (42 articles) published the most work on HPE during this period, though journals vary substantially in both articles per issue and issues per year. Considered in relative terms, HPE is most likely to appear in *World Politics* (12% of articles published in the journal from 2010 to 2021), the APSR (9%), and the QJPS (8%): see **Figure 2**.

Two-thirds of all articles that we identify focus on a single country, reflecting the prevalence of quasi-experimental approaches in HPE and mirroring broader trends in comparative politics (Pepinsky 2019). An exception that proves the rule is Jha & Wilkinson’s (2012) study of the effect of combat experience on organizational skill: They examine the partition of British South Asia into India and Pakistan. A true exception is Paglayan’s (2021) study documenting that mass primary education emerged in most countries before democratization—a robust finding that runs counter to the typical interpretation of theories in the spirit of Meltzer & Richard (1981).

Research on developed Western countries predominates. The United States (26%), the United Kingdom (7%), and Germany (6%) are the most studied single countries; studies of single countries in Western Europe account for 19% of all HPE articles we identified. Africa is the focus of only 5% of all HPE articles, most of which are multi-country analyses. Asia, Eastern Europe, and Latin America—at 7%, 6%, and 6% of the total, respectively—are also underrepresented. This bias is plausibly the consequence of the high data requirements of HPE work, a point to which we return below. Just over half of all articles start their investigation in the long nineteenth century (1789–1914), versus 21% and 28%, respectively, in the pre-1789 and post-1914 periods.



Figure 3

Relative incidence of topics in historical political economy research published during 2010–2021 in the *American Journal of Political Science*, *American Political Science Review*, *British Journal of Political Science*, *Comparative Political Studies*, *Comparative Politics*, the *Journal of Politics*, the *Quarterly Journal of Political Science*, and *World Politics*. Word cloud based on keywords manually assigned for each article in sample ( $n = 238$ ).

In the top three disciplinary journals—the *APSR*, *AJPS*, and *JOP*—55% of published HPE work is in comparative politics, with another 40% in American politics. By contrast, international relations—where cross-country designs tend to focus on the post–World War II period and macro-historical approaches are common—is atypical in HPE (5%). Thematically, scholarship in HPE is extremely heterogeneous, as **Figure 3** demonstrates. Democratization, colonialism, war, autocracy, violence, legislative and party politics, and state building/capacity are among the most popular topics.

To preview the discussion that follows, we can further categorize research in HPE by its use of history. Many HPE studies seek to understand the past for its own sake. Other research uses the past as a way of understanding the present. And still other work uses the past as a setting (a “sandbox”) for exploring theoretical arguments. Our rough count suggests that the first use of history is most typical (51% of all articles in our sample, versus 25% and 30%, respectively, for the second and third types),<sup>4</sup> though categories sometimes overlap, and distinguishing among them can be a matter of judgment. As **Figure 4** illustrates, there is substantial variation across substantive topics in the use of history, though a large share of work in all top substantive areas explores the past for its own sake. The use of history has also varied over time. In the early 2010s, the use of history to understand the past predominated. The incidence of HPE work that uses the past to understand the present took off around 2015, while research using history as a setting to explore theory became particularly prominent in the last four years of our sample period.

<sup>4</sup>We code 13 articles (5%) as spanning multiple categories.

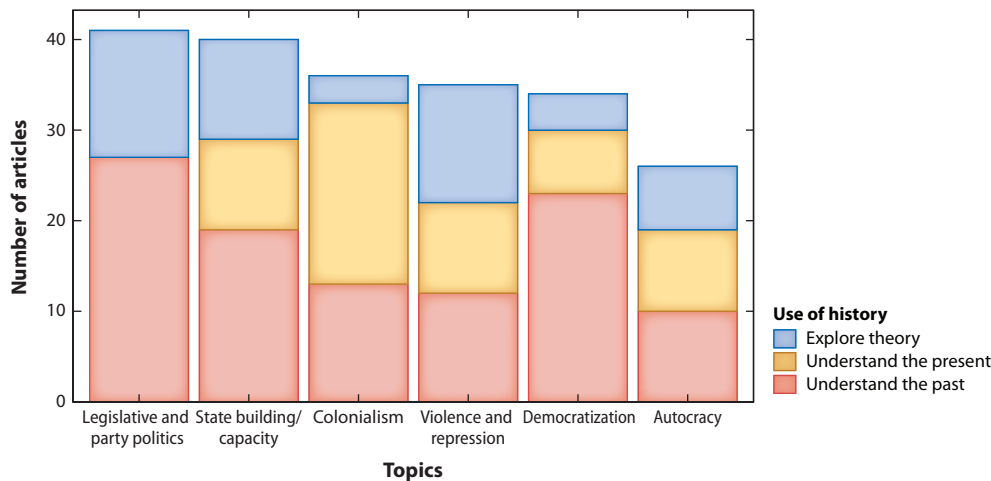


Figure 4

In historical political economy research published during 2010–2021 by the eight top political science journals reviewed, the six most prominent topics were legislative/party politics, state building/capacity, colonialism, violence/repression, democratization, and autocracy. Some articles cover more than one topic (e.g., colonialism and state building). Within each topic, history is used in various ways: to explore theory (*blue*), to understand the present (*gold*), or to understand the past (*pink*).

## HISTORICAL POLITICAL ECONOMY AS A WAY TO UNDERSTAND THE PAST

Articles in HPE habitually emphasize the relevance of a study for contemporary politics and economics. Yet, slightly over half of the HPE articles we identify are predominantly concerned with understanding the past for its own sake. In such work, history has intrinsic value. The prevalence of this type of research challenges the claim that social scientists use history primarily to explain the present or even forecast the future (Gaddis 2002, p. 58).

Most often (in roughly two-thirds of articles in our sample), the past to be understood is that of a single country, though multi-country studies are not uncommon. What distinguishes work in this category is the focus on understanding politics in a specific historical context rather than using that history to understand the present or to explore temporally unbounded arguments. Much scholarship of this type uses micro-level quantitative evidence to reexamine arguments from macro-historical research of an earlier generation—on the origins of democracy, the roots of economic development, and the growth of the state.

Democratization is a central theme of research of this type. Whereas earlier studies tended to view democratization as a single defining event, research in HPE disaggregates transitions to democracy into discrete institutional reforms, each of which can be studied using micro-level data within states (Capoccia & Ziblatt 2010). In this spirit, researchers have examined topics such as the emergence of parliaments, the introduction of electoral secrecy, the expansion of suffrage, and improvements in democratic representation using data on bill sponsorship, roll call votes, campaign expenditures, and subnational electoral outcomes (e.g., Aidt & Jensen 2017, Kam 2017, Kasara & Mares 2017, Teele 2018, Madrid 2019, Morgan-Collins 2021). They have additionally tested the micro foundations of classic theories of democratization by analyzing support for democratic reforms among political parties and economic elites (e.g., Ardanaz & Mares 2014, Albertus 2017, Nikolova 2017).

In related work, HPE scholars have investigated legislative process and party politics in early democracies such as the United Kingdom and United States using rich data from party documents, roll call votes, political speeches, and the biographies of political representatives (e.g., Carson & Sievert 2017, Eggers & Spirling 2018, Goet 2021). Such work often exploits text-as-data methods to estimate ideologies and explore various aspects of legislative behavior. Spirling (2016), for example, analyzes over half a million speeches in the British Parliament, showing that democratization reduced the linguistic complexity of political discourse as politicians sought to appeal to newly enfranchised voters, who were generally poorer and less educated.

Some articles in this category use panel data spanning centuries to examine structural change in politics. Gerring et al. (2021), for example, examine shifts in basic forms of governance in Europe from 1000 to the present and in the rest of the world from 1700 to the present. Their analysis suggests that monarchical rule was an efficient system of governance in large societies where citizens were isolated from one another but gave way to the republic with declines in communication costs. Similarly, Gartzke & Rohner (2011) investigate historical cycles of imperialism and decolonization, arguing that technological shocks facilitate colonial expansion but that the benefits of colonialism have declined with economic development.

As with any mode of research, there are trade-offs to the HPE approach to understanding the past. On the one hand, as discussed above, studies in the HPE tradition have uncovered novel empirical regularities by quantifying new forms of historical evidence (legislative speeches, roll call votes, etc.). They have tested the assumptions of earlier work and shed light on micro-level political processes behind macro-level phenomena such as democratization, state formation, and colonialism. On the other hand, the narrow focus in HPE on identifiable causes of particular outcomes risks overlooking the role of contingency and sequencing in macro-historical processes such as democratization or state building. It also obscures the complementarity among different elements of political systems, some of which may be difficult to observe.

## **HISTORICAL POLITICAL ECONOMY AS A WAY TO UNDERSTAND THE PRESENT**

History can also be used to explain variation in present-day outcomes. Papers on the long-run effects of historical institutions and events fall into this category. The basic components of a legacy-type argument are an outcome, an antecedent, and a mechanism linking the two (Wittenberg 2015). Scholars working in this tradition typically focus on contemporary outcomes such as political attitudes, electoral outcomes, and economic development. Such work emphasizes fundamental over proximate causes: For the articles in our sample, the average length of time between historical antecedent and contemporary outcome is 227 years. Scholars in HPE explore the link between antecedent and outcome using quantitative data and quasi-experimental designs—a departure from earlier research on historical legacies that employs process tracing and macro-historical comparisons (Simpser et al. 2018, Cirone & Pepinsky 2022).

Two dominant and related themes in HPE work on historical persistence are the long-run legacies of colonialism and the lasting consequences of violence and repression. The first builds upon the work of Acemoglu et al. (2001), who use historical variation in colonial institutions to estimate the effect of contemporary institutions on economic output. Subsequent research in HPE disaggregates colonialism into a series of specific interventions and pays more attention to the internal dynamics of colonial rule. Guardado (2018), for example, collects data on the prices at which the Spanish Crown sold colonial provincial governorships in Peru, showing that the selection of officials based on ability to pay exacerbated political conflict, increased ethnic segregation, and undermined institutional trust. She emphasizes the role of violent resistance to colonialism

and the reluctance of the indigenous population to assimilate as perpetuating the impact of colonial institutions over time. Other scholars use plausibly exogenous within-country variation in the form of colonial rule to understand the effects of different types of colonial institutions and policies, highlighting diverse mechanisms of persistence that include investment in state capacity (Mattingly 2017) and the divergent strength and accountability of traditional leaders (Lechler & McNamee 2018, Nathan 2019).

HPE work on the legacies of violence and repression has demonstrated the remarkable staying power of political identities and behaviors. Recent contributions have sought to isolate the effects of different aspects of violence (Charnysh & Finkel 2017), to compare the effects of repression across generations (Lupu & Peisakhin 2017), and to identify the political and economic factors that reinforce persistence following institutional change (Acharya et al. 2016). This research establishes that the effects of past violence can change over time in magnitude or direction. Rozenas & Zhukov (2019), for example, show that the long-run effect on political behavior of state repression—the “terror by hunger” in 1930s Ukraine—varies with political context. When the regime responsible for violence can threaten retribution, affected communities demonstrate loyalty to the regime; in contrast, when the threat of retribution abates, a history of repression breeds opposition to the regime. Other scholarship highlights the role of political entrepreneurs in activating latent attitudes produced by past violence to shape contemporary policy outcomes (Charnysh 2015). It appears that the effects of historical antecedents vary over time in theoretically interesting ways.

A common criticism of work on historical persistence is sparse evidence on the mechanism connecting antecedent to outcome. A number of recent studies address this concern with research designs that leverage variation in the purported mechanism of persistence. For scholars working on the intergenerational transmission of political identities, this has entailed the use of surveys alongside archival data. Charnysh & Peisakhin (2022), for example, build on existing work that demonstrates the persistence of political attitudes and behavior forged by 123 years of Habsburg rule in Galicia (e.g., Grosfeld & Zhuravskaya 2015). Proceeding from this well-established legacy, Charnysh & Peisakhin (2022) investigate the role of community bonds—a candidate mechanism—in the reproduction of attitudes and behavior. To do so, they exploit as-if-random variation in the size of the Galician community forcibly displaced from eastern borderlands to western Poland after World War II, estimated from archival materials, and survey both the descendants of forced migrants from Galicia in western Poland and a control group in eastern Poland that did not experience resettlement. By design, this study thus isolates the causal effect of community as opposed to family and institutional transmission in intergenerational persistence, though it is worth emphasizing that the study relies on qualitative evidence to specify *how* communities reinforced persistence.

Like HPE work that uses history to understand the past, the literature that uses history to understand the present faces trade-offs. On the one hand, adopting a long-run perspective allows for time to observe the consequences of major political phenomena, such as extractive institutions, genocide, and segregation. Tracing political behavior and institutions over the *longue durée* can also shed light on processes of social change and continuity more broadly. On the other hand, there are challenges in establishing mechanisms of persistence and reproduction, as discussed above. In addition, a focus on long-run effects encourages the “compression” of history (Austin 2008), whereby scholars link historical outcomes to causes that are removed by decades or even centuries while overlooking the effects of antecedents in intermediate periods (Abad & Maurer 2021).

The compression of history relates to a more general concern: the publication of spurious correlations misunderstood as legacies. Scholars investigating the effects of historical events and institutions have a potentially unlimited supply of contemporary outcomes to consider. One may easily find a significant result by chance and thus seem to confirm persistence—a problem



exacerbated by publication bias toward significant results (Abad & Maurer 2021). Authors working on legacies can address this concern by considering preregistration (Cirone 2022), whereby a project's research design, hypotheses, and planned analyses are posted in a public registry prior to any analysis of the data. Reviewers and editors can also contribute to our understanding of historical persistence—e.g., why some antecedents matter and others do not, and the rate at which legacies decay—by demonstrating openness to publishing null results of well-designed studies.

## **HISTORICAL POLITICAL ECONOMY AS A WAY TO EXPLORE THEORY**

A final class of work in historical political economy uses the past not (primarily) for its own sake, and not to understand the present, but as an apt setting to explore theoretical conjectures. A typical paper of this type posits the existence of a historical episode ideally suited to adjudicate some theoretical debate—the implication being that the exercise could just as well be situated in the present, if only there were analogous data or institutional variation.

Fourinaies (2021) illustrates this approach. A substantial theoretical literature suggests that campaign spending limits may either increase or decrease the competitiveness of elections, with no established empirical consensus. To explore this question, Fourinaies assembles rich data on elections to the UK House of Commons from 1885 to 2019, a period during which there were shifting rules on the amount that candidates could spend. Critically, changes to the rules governing such spending were typically different for boroughs and counties, allowing for a type of difference-in-differences design. Fourinaies's finding that limits to campaign spending increased electoral competition has implications for the regulation of campaign spending elsewhere—a point to which we return below.

As this example suggests, there are various potential advantages to using the past to explore theory. Historical episodes can provide the institutional variation and long time series that allow for identification of causal effects. In addition, historical data are sometimes richer than contemporary data, as is often the case when personal information is involved. In the United States, for example, individual census records are released to the public only after 72 years (though qualified scholars may use contemporary data at Research Data Centers located on university campuses and elsewhere); other countries have similar restrictions. Certain historical episodes are also better documented. Much more is known about the Holocaust, for example, than about more recent genocides (Kopstein et al. 2023), the consequence in part of the perpetrators' focus on record keeping (Braun 2016) and high levels of education among the victims. Similarly, Soviet scholars working in a Marxist tradition were particularly meticulous about documenting the "peasant movement" that preceded the Bolshevik Revolution, providing scholars with unusual insight into the nature of resistance in an agrarian political economy (Finkel et al. 2015, Finkel & Gehlbach 2020).

All HPE work that uses the past to explore theory exploits at least some of these advantages. There is, nonetheless, important variation in the nature of such research. One important distinction among papers in this category concerns the vintage of the theory to be explored. Fourinaies (2021) exemplifies one approach: bring empirical work to bear on a debate in which established theories point in different directions. Castañeda Dower et al. (2018) do much the same, exploiting data from Imperial Russia on the history of peasant unrest and peasant representation in provincial assemblies to explore competing theories of collective action and representation in autocracies.<sup>5</sup>

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<sup>5</sup>Castañeda Dower et al. (2018) additionally offer a generalization of one of those theories to increase the model's "overlap" with the target of the empirical design (Ashworth et al. 2021); see also Castañeda Dower et al. (2020).

Other authors provide new theory alongside existing frameworks. Garfias & Sellars (2021), for example, offer a theory of the trade-off between revenue and order in the centralization of state administration. They present supporting evidence in a study of state centralization in sixteenth- and seventeenth-century Mexico that exploits population collapses induced by climate shocks. Similarly, Larson (2017) draws on social-network theory to develop a model of informal governance that allows for persistent misbehavior—an important phenomenon in the mining towns of the American West.

Beyond the distinction between old and new theory, there are other important differences in the nature of theory explored by the literature in this category. Theory can be formal, as in various papers described above (though with the actual formalization sometimes relegated to a published or online appendix), or informal, as in Muchlinski's (2021) study of the provision of security in the Jewish community of Palestine from 1920 to 1948, which draws on notions of property rights that originate with Coase (1937, 1960) and subsequent work in the New Institutional Economics (Williamson 2000, Ménard & Shirley 2005). Theory, moreover, can be comparatively broad or narrow—intended to apply to a broad range of cases, whatever the nature of the empirical application, or focused on a particular polity. As an example of the former approach, Petrova (2011) uses data from nineteenth-century America to examine the contention (based in part on historical work elsewhere) that large advertising markets encourage development of a free press. Gamm & Kousser (2013), in contrast, draw primarily—though not exclusively—on theories of American political representation to situate their study of the political power of American cities.

In summary, there is rich variation in the nature of HPE scholarship that aspires to use the past to explore theory. But to what extent can such work, usually though not universally situated in a single country, in fact contribute to our theoretical understanding of political institutions and behavior? Any answer to this question inevitably touches on the trade-off between internal and external validity, a point to which we return below. With respect to HPE of the type considered here, the concern that findings may not generalize is magnified by institutional change over time, such that even typical environments yesterday may be atypical today. Effective use of the past to explore theory situates the reader in parameter space (Huber 2013), helping her to understand which (historical, contemporary) cases are similar to that being studied. Thus, for example, Fourinaies (2021) points to other countries, including especially former territories of the British Empire, that regulate campaign finance in a manner similar to the United Kingdom during the period he examines.

A final point touches on the relationship between the use of history to explore theory and the use of history to explore the past. As Gailmard (2021b) emphasizes, HPE scholarship oriented primarily toward understanding the past can supply new theory, to the extent that existing mechanisms are recombined or supplanted to explain some historical phenomenon—an approach at the center of Gailmard's (2017, 2019, 2021a) own work on the colonial origins of American political institutions. New theory thus enters the “library of mechanisms” (Guala 2005) that social scientists use to understand the world. Subsequent research in HPE can weigh the importance of that theory in other settings using designs of the sort discussed here.

## CHALLENGES OF HISTORICAL POLITICAL ECONOMY RESEARCH

Doing social science well is hard. In this section, we document some of the particular challenges for scholars in HPE, addressing both practical and analytical constraints.

The practical challenges of doing HPE research are several. Junior scholars entering the field—or even senior scholars changing research focus—face high start-up costs. Standard doctoral training assumes that, in addition to facility in social scientific method, students acquire substantial

knowledge of the period and, typically, the language of the region on which they work. For scholars of HPE, the demands are broader. HPE researchers who use history to explain the present must acquire expertise in two often very different historical periods. Languages evolve over time, undergoing reforms and standardization; the entire alphabet might change. Moreover, historical sources often include handwritten records, with distinctive types of handwriting practiced during different periods. Thus, an HPE scholar working on the Ottoman Empire will have to understand documents written in Arabic rather than Latin script, a scholar of Austro-Hungarian lands will be advised to familiarize herself with the Gothic script, and those of the Roman Empire will need to read pre-reform Russian—all while knowing the relevant history. Many aspiring HPE students will find that faculty in their home department do not possess the relevant expertise, and even established scholars will need to reach well beyond disciplinary boundaries to acquire the necessary knowledge.

An additional practical challenge relates to the availability and accessibility of data. Some regions of the world have more and/or better-preserved historical data, contributing to the geographic biases in HPE work that we document above. Even when data are available, their digitization often poses particular challenges, such as the inability of existing algorithms to parse historical characters or cursive, the inconsistent structure of data sources, or the simple refusal of archives and collections to allow photocopying or scanning. To surmount these obstacles, scholars often resort to transcribing data by hand—a labor-intensive exercise that diverts resources from other tasks. In lieu of survey data, HPE researchers turn to electoral returns as imperfect measures of public opinion, with the problems of ecological inference that such aggregate data imply. Scholars even rely on “natural archives” such as ice cores, tree rings, and lake sediments to measure ecological conditions that might influence political or economic behavior (e.g., Di Cosmo 2018, Sellars & Alix-Garcia 2018).

Many social scientists use geographic information systems software to map data sets and study spatial dependencies. For scholars of HPE, there are particular challenges in using this tool. Historical place names may refer to communities that no longer exist, that have changed names, or that are no longer in the same country. Researchers working with historical data therefore often geocode locations manually rather than use geocoding services to locate and link observations. Working with vector data is also difficult. State borders and administrative boundaries within states change over time; as one moves further into the past, not only geopolitical but also geographic features (rivers, forests, etc.) may change considerably. Moreover, historical maps are often less precise than contemporary maps and frequently omit information about geographic projection. Not least, many historical phenomena do not follow administrative boundaries or may be difficult to relate across different time periods. For all these reasons, scholars in HPE often invest heavily in the digitization of historical maps, using various spatial interpolation techniques to match administrative units across historical periods. Where appropriate, they conduct analysis within grid cells rather than administrative units.

Even the publication of research in HPE involves practical constraints. Given HPE’s interdisciplinary and methodologically diverse nature, the review process may involve referees from multiple disciplines with sharply divergent expectations and preferences, not to mention varying degrees of familiarity with historical context and empirical method. The need to present often unfamiliar historical episodes alongside the usual elements of a manuscript also pushes up word counts, favoring journals with more generous space constraints such as the *APSR* and *World Politics* (see **Figure 2**).

All of these challenges are real, but various developments have offset some of the costs of doing research in HPE. As the discipline becomes more international in its composition, many scholars enter the field with knowledge of at least contemporary languages and context—a shorter

leap than for those who must learn both a new country and a new period. In many regions, data access is also easier than it was even a decade ago, as numerous archives and libraries have embarked on digitization of their collections. Technological innovations, such as the National Science Foundation–funded LayoutParser (Shen et al. 2021), have also lowered the costs of coding historical data.

The analytical challenges that HPE research faces are also substantial. As a rule, the availability and quality of evidence deteriorate as one goes back further in time. Archival and other records exist because past government officials and other elites considered the topics they covered important: taxation and defense, for example, but not social and political relations. Their concerns are not necessarily those of the contemporary researcher, thus limiting the sort of questions that scholars might pursue. Even within particular periods, some actors may be incentivized to report behavior (e.g., peasant unrest) that others are incentivized to hide. Not least, only a fraction of the records available at any point in time actually enters official archives, at which point various forms of attrition reduce available data further. These issues are well known to historians—indeed, gaps in archival records can themselves be useful (see Dennison 2021a)—but social scientists are not generally trained in the use of archives, and they use archival data differently (Lee 2022). In principle, HPE scholars are well equipped to correct for biased selection into data sets, including those drawn from archives (Gehlbach 2021), but doing so requires detailed knowledge of the long chain of actions that leads from political and economic behavior to a file produced by an archivist (Lee 2022)—knowledge that is more typically the domain of the historian than the social scientist.

An important difference between research in HPE and much other political science is thus the limited control that HPE scholars have over the data-generating process: They are at the mercy of actors long deceased. Yet, even if HPE scholars cannot impact data collection itself, they must necessarily make decisions about the conceptualization and operationalization of variables despite not being trained as historians. Current practices leave room for improvement. In prioritizing causal identification and quantification, HPE scholars often fail to acknowledge the messiness, complexity, and ambiguity of historical evidence. Reporting the uncertainty of regression estimates is straightforward, but no equivalent metric exists for highlighting the uncertainty and bias of historical sources. Indeed, publication practices do not reward scholars for acknowledging conflicting historical interpretations or problems with data that cannot be remedied through statistical techniques. Relatedly, the focus on theory testing—particularly on establishing the effect of a single cause, as is common in HPE—increases the risk of confirmation bias, whereby scholars privilege historical works that support their statistical evidence (Møller & Skaaning 2021, p. 105).

How should HPE scholars approach the task of making decisions that are informed by the historiography? Møller (2022, p. 526) suggests a “golden rule” for political scientists doing historical work: “Read historians and read them carefully!” More specifically, he argues that HPE scholars should (*a*) keep up with historians’ changing knowledge of the past, (*b*) use specific concepts that can be operationalized with a minimum of speculation, and (*c*) acknowledge the uncertainty and limitations of historical evidence. “Reading history forward” (Møller 2020) in this manner is particularly important for researchers who use history to understand the present or explore theory, where there is risk of interpreting the past in light of what follows or assuming that historical institutions functioned similarly to their contemporary namesakes.

This advice relates to a final analytical challenge for HPE research: the tension between disciplinary incentives to make general statements and the scholar’s interest in fidelity to her case. In a pessimistic but likely common scenario, researchers may downplay key features of the historical context to emphasize the broader applicability of their results (Dippel & Leonard 2021). Here, a bit of epistemological modesty is in order: Statements about the generalization of findings to other cases are themselves theoretical, as they assume that institutions operate in a similar manner

in countries or periods that are alike in some observable fashion (Gailmard 2021b). In practice, institutions are “multi-stranded”; they are “interlocking parts of a larger social system” (Dennison 2021b). There may, for example, be characteristics of serfdom and slavery that carry across space and time, but the labels also obscure important differences in how these institutions operated, in dependence on other institutions. Understanding such differences can itself be a goal of HPE research—one facilitated by the toolbox that social scientists bring to the task.

## THE FUTURE OF THE FIELD

Where does HPE go from here? How best can the field be organized to address the challenges discussed above? What should be done to ensure that HPE remains an important, relevant, and integral part of the discipline? In this final section, we address these questions from two perspectives: how scholars should prepare to study HPE, and what scholars of HPE might consider studying.

As a mode of inquiry, HPE is inherently interdisciplinary—in an era when hiring, publishing, and promotion practices all encourage specialization. In our view, this interdisciplinarity is fundamental to the success of the field, but it is not always easy. Even sympathetic historians worry about social scientists’ approach to context (Dennison 2021b) and measurement. Social scientists, in turn, suspect that historians do not always appreciate the role that econometric technique plays in addressing their concerns. [Political scientists and economists, in contrast, have found it comparatively easy to collaborate, given similarities in research style (see, for example, Castañeda Dower et al. 2018, Amat et al. 2020).] Such friction is probably inevitable, but the quality of the conversation would be improved, and opportunities for collaboration would be more frequent, if social scientists and historians had greater understanding of each other’s methods.

We are not in a position to make recommendations about graduate training in history, but Ph.D. programs in political science can and should provide opportunities for students to learn historical methods. We have in mind especially training in archival methods, which many departments cover cursorily, if at all. Emerging HPE scholars should also consider training in other qualitative methods, even if their primary focus is quantitative. Although graduate education should properly focus on learning a particular approach well, rather than multiple approaches poorly (Gehlbach 2015), an awareness of other methods can help to fill in the details—say, when qualitative analysis is necessary to justify a research design and establish causal mechanisms (Kocher & Monteiro 2016).

Properly equipped, scholars of HPE will have choices about what to study. We hope that reviews such as ours might encourage researchers to think about what has already been learned, and what might be done to accumulate knowledge, rather than simply reach for the most available quasi-randomization. Callis et al. (2023) discuss fruitful research agendas that have pursued design-based research across a variety of domains: the study of colonial rule, missionary activity, forced labor, and the slave trade. Learning accumulates, they emphasize, when similar designs are used in different contexts; mechanisms come into view when a similar treatment is examined with different outcomes. (Formal) theory also plays a role. As Rozenas (2021) observes, “[e]mpirical HPE looks like a field on which everyone throws their own brick. . . . Theorists could be of great help in building a useful structure out of those bricks.”

All that said, there are important topics in political science that have yet to be systematically explored by scholars of HPE. The field’s emphasis on causal identification and statistical methods means that phenomena and actors that are hard to quantify are understudied. Formal institutions are privileged over informal ones, elites over nonelites, and Western societies over other parts of the world. HPE has also disproportionately focused on a few select topics, as we have discussed: democratization, legislative and party politics, state building and capacity, colonialism,

and violence and repression. Yet, if historians have been able to explore other questions, so too should historically minded social scientists. Race, gender, and ethnicity are obvious candidates for more systematic study; so is climate, given the frequency of weather anomalies and climatic shifts throughout history (Javeline 2014, Charnysh 2021). Scholars new to the field will have other ideas. There is the entirety of recorded human experience from which to learn.

## DISCLOSURE STATEMENT

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