

## FORUM

# Contextualizing the Contextualizers: How the Area Studies Controversy is Different in Different Places

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As part of recent years' efforts at reaching a more context- and diversity-sensitive study of international relations, the nexus between fields of IR and Area Studies (AS) has received a renewed attention. While AS is usually presented as the "contextualizer" of the disciplines, this forum reverses the perspective by suggesting that an awareness of both diversity and context is also relevant when it comes to understanding the evolution of the field of AS and its relations to IR. In this forum, a selection of scholars with diverse backgrounds (US, Middle East, Europe, Latin America, Africa, and Central Asia), different (inter)disciplinary trainings and regional orientations examines how various fields of AS and its relations to the disciplines

vary, and what follows from a stronger attention to such kind of diversity. By contextualizing the contextualizers, the forum brings attention to how a context-sensitive field can also suffer from its own provincialism. While the US-centric narrative about AS might have been almost “hegemonic,” at closer inspection, it turns out that AS in different (sub)disciplinary and geographical settings have evolved differently, and in some places the so-called Area Studies controversy (ASC) has been almost absent. A broadening of the perspective also reveals how the challenges to a successful cross-fertilization are not limited to those outlined in the “classic” ASC, but the forum does simultaneously offer encouraging lessons on how dialogues between area specialists and discipline-oriented scholars can help to overcome epistemological, theoretical, or methodological blind spots. Rather than presenting the IR/AS nexus as a panacea *per se*, the aim of the forum is therefore to invite to a broader and more self-reflective discussion on some of the opportunities as well as challenges associated with this strategy for making the study of international relations more context-sensitive and attentive to different forms of diversity.

El nexo existente entre los campos de las RRII y los Estudios de Área (AS, por sus siglas en inglés) ha recibido una atención renovada, como parte de los esfuerzos que se han llevado a cabo durante los últimos años para lograr que el estudio de las relaciones internacionales sea más sensible al contexto y a la diversidad. Si bien los EA suelen presentarse como “contextualizadores” de las diferentes disciplinas, este foro pretende invertir esta perspectiva sugiriendo que la conciencia, tanto en materia de la diversidad como en materia del contexto, también es relevante a la hora de comprender la evolución del campo de los EA y sus relaciones con las RRII. En este foro, una selección de académicos de diversas procedencias (EE. UU., Oriente Medio, Europa, América Latina, África, Asia Central), con diferentes formaciones (inter)disciplinarias y con orientaciones regionales, examina cómo varían los diversos campos de los EA, así como sus relaciones con las disciplinas, y las consecuencias de prestar una mayor atención a este tipo de diversidad. Por el hecho de contextualizar estos contextualizadores, el foro pone de manifiesto cómo incluso un campo sensible al contexto puede sufrir de su propio provincialismo. Si bien la narrativa en materia de EA centrada en los Estados Unidos podría haber llegado a ser casi “hegemónica,” podemos observar, si se estudia más de cerca, que los EA han evolucionado de manera diferente en diferentes entornos (sub)disciplinarios y geográficos, y que, en algunos lugares, la llamada controversia de los Estudios de Área (ASC, por sus siglas en inglés) ha estado casi ausente. Una ampliación de esta perspectiva también revela cómo los desafíos para una retroalimentación exitosa no se limitan a los que esboza la ASC “clásica,” sino que el foro ofrece simultáneamente lecciones alentadoras sobre cómo los diálogos entre los especialistas de esta área y los académicos orientados a esta disciplina pueden ayudar a superar los puntos ciegos epistemológicos, teóricos o metodológicos. Por lo tanto, en lugar de presentar el nexo RRII/AS como una panacea *per se*, el objetivo del foro es invitar a un debate más amplio y autorreflexivo sobre algunas de las oportunidades y de los desafíos asociados con esta estrategia con el fin de conseguir que el estudio de las relaciones internacionales sea más sensible al contexto y esté más atento a las diferentes formas de diversidad.

Dans le cadre des efforts des dernières années en vue d’une étude des relations internationales plus sensible au contexte et à la diversité, les relations entre les domaines des RI et Études régionales (ER) ont connu un regain d’intérêt. Bien que les ER soient généralement présentées comme le “contextualisateur” des disciplines, ce forum inverse ce point de vue en suggérant qu’une sensibilisation à la diversité et au contexte est égale-

ment pertinente pour comprendre l'évolution du domaine des ER et ses relations avec les RI. Dans ce forum, une sélection de chercheurs aux profils variés (États-Unis, Moyen-Orient, Europe, Amérique latine, Afrique, Asie centrale), aux différentes formations (inter)disciplinaires et orientations régionales s'intéresse à comment divers domaines des ER et leurs relations avec les disciplines varient, et aux conséquences d'un intérêt grandissant pour de telles formes de diversité. En contextualisant les contextualisateurs, le forum attire aussi l'attention sur comment un domaine sensible au contexte peut souffrir de son propre provincialisme. Bien que le récit centré sur les États-Unis concernant les ER ait pu être presque "hégémonique", en y regardant de plus près, les ER dans différents contextes (sous-)disciplinaires et géographiques ont évolué différemment. À certains endroits, la soi-disant controverse des Études régionales (CER) est pratiquement absente. Un élargissement du point de vue révèle également que la réussite de la fertilisation croisée ne se limite pas à sa description dans les CER "classiques", mais le forum offre également des leçons encourageantes: le dialogue entre les spécialistes du domaine et les chercheurs orientés vers la discipline peuvent permettre de surmonter les angles morts épistémologiques, théoriques et méthodologiques. Plutôt que de présenter les relations entre RI et ER comme une panacée en tant que telle, ce forum a donc pour but d'inviter à une discussion plus large, qui pousse à l'autoréflexion, quant à certaines opportunités et certains défis associés à cette stratégie afin de rendre l'étude des relations internationales plus sensible au contexte et attentive à différentes formes de diversité.

**Keywords:** Area Studies, Area Studies Controversy, hierarchies of knowledge production

### Introduction: The Area Studies (Controversy): Going Beyond the Conventional US-centric Narrative

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A prominent theme in the study of international relations in the new millennium concerned whether not only international relations but also the scholarly field of IR is "quite different in different places" (Wæver 1998). This has given rise to calls for a more context-sensitive and self-reflective study of international relations. Various strategies have been suggested for how IR scholars can become less parochial and more attentive to different kinds of diversity (Gelardi 2020). One of these involves a stronger cross-fertilization with the field of area studies (AS). Already back in the early 1960s, Modelski (1961, 143) argued that "International Relations needs Area studies," and in the past two decades, the IR/AS nexus has received renewed attention as a way forward for a more context- and diversity-sensitive study of international relations (Valbjørn 2004; Teti 2007; Aris 2021; Bank and Busse 2021; Kaczmarek and Ortmann 2021).

This forum is sympathetic to the ambition of promoting more attention to diversity and context and shares the interest in the nexus between AS and the social science disciplines, including IR. At the same time, we suggest that an awareness of both diversity and context is also relevant when it comes to understanding the evolution of the field of AS, although this has received far less attention. In this forum, we therefore reverse the predominant perspective. Instead of asking how

AS can contribute in making IR and other parts of the social sciences more diverse and context-sensitive, as previous interventions have done, this forum asks—similar to what Ole Wæver a quarter of a century ago did in relation to IR—whether the field of AS and its relations to the disciplines are different in different places, and what follows from a stronger attention to such kind of diversity. Before turning to the contributions to this forum, in the following sections, we first provide a short outline of the conventional narrative about the evolution and rationale of AS as a “contextualizer” and the main features of the so-called Area Studies Controversy (ASC). Then, we reverse the perspective and discuss why it is also important to contextualize the contextualizers—namely AS—and how the forum contributes to this effort by offering nuanced engagements with both different social science sub-fields as well as different regional contexts.

*The Conventional (US-centric) Narrative about the Area Studies (Controversy)*

The precursors of US AS originated in the 1920s and 1930s with the help of funding from the Carnegie and Rockefeller foundations (Lockman 2016). The real takeoff, however, took place in the early days of the Cold War, when Robert Hall (1947) in the American Social Science Research Council (SSRC) made a plea for the institutionalization of AS (Mitchell 2004; LIAS 2012, see also Shami in this forum). The justification of geographically compartmentalized studies specializing in the different regions was partly based on a geopolitical rationale. Contrary to European colonial powers that had been able to build up regional expertise over centuries, the United States was lacking regional specialists with knowledge of those regions that became of increasing strategic importance with the elevation of the United States to a global power. Following Binder (1976, 11), the original *raison d'être* of AS did at the same time rest on a more general assumption about how “there are very significant differences among peoples and cultures” so “what we know about ourselves is an inadequate basis for understanding others.” In this way, Binder explained, “area study casts doubt on the idea of a universal history, the whole of which has some single meaning, or which, taken in its entirety, lends itself to a single definition of man.” From this perspective, expertise in regional cultures, histories, and languages therefore represents a necessity for any thorough understanding of social and political phenomena, and the role of AS would accordingly be to challenge and problematize ethnocentric assumptions and provide contextualization to universalist claims in the social sciences (Szanton 2004).

An important dimension in the conventional narrative about AS and its relation to the disciplines, however, also points to unrealized potentials and tensions between context-sensitive area specialists and discipline-oriented scholars. In the “classic” ASC (Tessler et al. 1999), members of the “disciplinary” camp are portrayed as mainly paying attention to commonalities and regularities that are supposed to enable the social sciences to unveil social laws with validity across time and space. The Middle East, for instance, is perceived as a “region like any other” and regional politics are assumed to follow the very same logics as anywhere else. In turn, AS scholars are supposed to be much more attentive to the particular and distinctive. So, the Middle East will to a larger extent appear as a “region like no other” with various distinct traits to be accounted for in order to gain any real understanding of this part of the world. The assessment of what constitutes good scholarship does accordingly differ. Scholars of the disciplines will mainly aspire to mastering the literature of their discipline as well as the acquisition of high theoretical and methodological sophistication. Meanwhile, serious AS scholarship will, in addition to the mastering of the (political, cultural, economic, historical) literature on their region, require field research and fluency in local languages. In the conventional portrayal of the ASC, these differences have given rise to various charges. Area specialists have been criticized for lacking conceptual sophistication and methodological rigor, favoring

description over explanation, having no interest in parsimony and generalizations, and with suffering from a “regional narcissism,” leaving AS almost “blinded by” local particularities. In turn, “disciplinarians” have been charged with faddishness, with engaging in sterile theoretical debates, and with constructing highly abstract models that provide little real insight into complex behavioral patterns. This, the argument goes, has left the disciplines not only blind to local particularities, but also blind to their own Western-centric perspective (Valbjørn 2004).

The ASC is usually associated with the 1990s, when scholars were debating whether the end of the Cold War and euphoric claims about the “End of History” also meant the end of AS. Thus, some of the large US foundations withdrew their support to AS just as SSRC and the American Council of Learned Societies dissolved their joint AS committees on the grounds that the social sciences now called “for less attention to in-depth studies of regional particularisms and more attention to themes of global relevance” (Tessler et al. 1999, x). In the new millennium, the debate has evolved in various directions. Compared to the tensions as they were portrayed in the 1990s, there has been a growing interest in moving beyond the “classic” ASC and exploring how a stronger cross-fertilization between AS and the disciplines can be promoted through different kinds of dialogues (Valbjørn 2017). While much of the AS debate was originally closely related to comparative politics, this more recent effort has in particular been visible within the nexus between IR and AS (Bank and Busse 2021, 550), notably in relation to discussions on how the study of international relations can become more context sensitive (e.g., Hurrell 2020; Kaczmarek and Ortmann 2021; D’Amato et al. 2022). In parallel, insightful calls have emerged for the (re)birth of a more critical and/or transregional or comparative form of AS (LIAS 2012; Derichs 2017; Ahram et al. 2018; Middell 2018; Milutinovic 2020; Rehbein 2020), while still others have even more critically questioned the very rationale of these efforts (Mitchell 2004).

#### *Contextualizing the Contextualizers*

Certainly, the conventional narrative is nuanced and attentive to how the link between AS and the disciplines, including IR, has evolved. However, given AS’s reputation as a contextualizer, it is puzzling how the evolution of AS is often accounted for in a rather unspecific manner, lacking crucially needed contextualization. Thus, while being important interventions in their own right, discussions about AS are usually limited to dynamics in US academia (e.g., Tessler et al. 1999; Szanton 2004; Lockman 2010, 2016; Stevens et al. 2018), thereby overlooking the diversity of AS scholarship beyond the United States. This parallels the dispute concerning the conventional tale about the origins and evolution of IR as being “An American social science,” as famously stated by Hoffmann (1977; cf. Crawford and Jarvis 2001). In recent years, this has not only fostered a critical awareness of the prevalent US-centrism and underlying hierarchies of knowledge production in the study of international relations, but also brought attention to IR’s multiple origins and how the field has evolved differently in different places (Wæver 1998; Thakur and Smith 2021).

Against this background, it is natural to ask whether the field of AS has also evolved differently in different places and differently in relation to different disciplines, and to consider whether the ASC as presented in the conventional narrative actually represents the general dynamics between AS and the disciplines as a whole. While AS is not a uniquely American way of organizing knowledge and the basic challenge of avoiding being blind to/blinded by local particularities should be of relevance to any kind of scholarship, the exact way the dynamics between context-sensitive area research and discipline-oriented scholarship unfold may be contingent not only on the specific (sub)discipline (such as IR, comparative politics, sociology) and type of AS (Asia, Middle East, Latin American studies), but also

on the geo-positionality of the scholars. Thus, one of the findings from interviews conducted with scholars in US and European contexts during the 2000s was that the former were more concerned about the ASC than the latter (Valbjørn 2008). More recently, Lynch (2021) has similarly noted how strikingly different discussions about the ASC are in Europe and the United States, but in his view, the center of ASC has now moved to Europe, whereas it today plays a far less prominent role in American discussions about the production of knowledge.

If, therefore, context matters, this prompts the question of which types of contexts merit consideration. We suggest that there are three kinds of contexts or dimensions to consider. The *first* one concerns which geographical area researchers relate their research to. So far, we have referred to AS, but there might be differences in whether a scholar is part of Chinese, Latin American, Middle East studies or related scholarly communities, as each is equipped with different gate-keeping dynamics (Mirsepassi et al. 2003). The language barrier is, for instance, considerably higher in Chinese studies compared to Latin American studies. A *second* dimension concerns scholars' (multi/inter/trans) disciplinary background and training. This does not only concern differences between (sub)disciplines, e.g., political science versus sociology or IR versus comparative politics, but also differences between "mono" and "multi/trans/inter" disciplinarily trained scholars. *Finally*, geography also matters regarding scholars' own geo-positionality in three different respects. Firstly, geo-positionality comes into play in terms of where researchers are geographically situated, e.g., in the United States, Europe, or the Global South. Secondly, their institutional position may also matter, e.g., narrow disciplinary versus AS center or inter-disciplinary institutions. Thirdly, geo-positionality is important concerning the implications of a researchers' country of origin and concomitant biases as well as privileges or obstacles for their studies. As a result, therefore, we contend that it is important not only to pay more attention to the diversity of forms of AS but also to a possible multiplicity of Area Study Controversies depending on these different dimensions.

#### *Contributions and Key Insights*

On this basis, this forum has assembled a selection of scholars with diverse backgrounds (United States, Middle East, Europe, Latin America, Africa, and Central Asia), different kinds of (inter)disciplinary training, and different regional orientations. The first three contributions engage with the ASC based on a specific regional focus. Stefanie Ortmann and Asel Doolotkueva turn to the emerging field of Central Asian AS and show how hierarchies of knowledge production privilege Western interpretations of the region and how these have subsequently also been adopted by scholars from the region. With a focus on the South African case, Karen Smith asks what relevance the debate about the relationship between IR and AS has had for African IR and suggests that the "classic" ASC reflects a Western-centric understanding of the relation between IR and AS with little resonance in an African context. Seteney Shami asks what Middle East studies look like when viewed from the region itself versus its American birthplace and when compared to other AS. Against this background, she suggests that in the evolving global institutional landscapes (Middle East) AS hold the potential of reinventing itself as a truly global field of knowledge.

The following three contributions relate their findings to a broader perspective in terms of disciplinary and regional orientation. Sérgio Costa examines the relationship between sociology and AS in Germany, demonstrating how they differ from how other disciplines have interacted with AS. While AS initially was relegated to the role of applying theories developed in sociology, since the turn of the twenty-first century, AS has grown in importance and become an essential and equal partner in the endeavor of building a more complex and coherent understanding

of global dynamics. Based on insights from social movement studies (SMS), Irene Weipert-Fenner and Jonas Wolff highlight the neglect of South–South traveling of concepts in the traditional AS debate. To remedy this gap, they call for a stronger exchange between area specialists working on different regions in the Global South. Finally, Saskia Schäfer and Norma Osterberg-Kaufmann, drawing on their experiences in democracy research in Southeast Asia, contend that the widely discussed crisis of liberal democracy is also a crisis of democracy studies, attributing this to a (neo)modernization paradigm that favors quantitative methods over area-specific expertise and alternative conceptions of democracy.

The contributions to the forum offer a number of broader insights relevant for the discussion about whether and how AS can contribute to the present efforts at making the study of international relations more context- and diversity-sensitive. By contextualizing the contextualizers, the forum brings attention to how a context-sensitive field can also suffer from its own provincialism. While the US-centric narrative might have been almost “hegemonic” (Shami), at closer inspection, it turns out that AS in different (sub)disciplinary and geographical settings have evolved and been debated quite differently, and in some places the ASC has been almost absent (as in Africa, see Smith). A greater sensitivity towards this diversity may contribute to an awareness of how the challenges to a successful cross-fertilization are not limited to those outlined in the “classic” ASC. In addition to some of the well-known challenges, also highlighted in this forum (Schäfer and Osterberg-Kaufmann), there are others, such as the need for more dialogue among different area studies specialists themselves (Weipert-Fenner and Wolff) and, no less important, a stronger inclusion of scholars beyond the Global North (Ortmann and Doolotkiewa). At the same time, by broadening the perspective, it is also possible to identify more encouraging lessons on the possibility of less hierarchical forms of dialogues between area specialists and discipline-oriented scholars, and how this may make it possible to overcome epistemological, theoretical, or methodological blind spots and lead to more complex and consistent understandings of international relations (Costa). Rather than presenting the IR/AS nexus and a critical engagement with the ASC as a panacea *per se*, the aim of the forum is to invite a broader and more self-reflective discussion on some of the opportunities as well as challenges associated with this strategy for making the study of international relations more context-sensitive and attentive to different forms of diversity.

### **Between Local and Global Political Economies of Knowledge Production: The Emergence of Central Asian Area Studies**

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Recent calls for a less Eurocentric IR and political science once again look towards area studies (AS) to help “globalize” disciplinary knowledge production. At the same time, AS has been evolving in some places, with researchers pushing for a new, multidisciplinary and “multicentric” epistemology, explicitly rooted in and building on local knowledges beyond the “core West” (Rehbein 2020). This “new AS” does seem to promise a way out of entrenched disciplinary Eurocentrisms, positing AS as lead discipline for an epistemically just rethinking of the social sciences. But this overlooks the fact that there is a potent intersection of global and local political economies of knowledge production that perpetuate familiar hierarchies and distinctions within AS adjacent to political science and IR, particularly for local researchers “outside the core West.” Current debates in Central Asian studies point

to inequitable power dynamics, from access to academic gatekeeping positions to hierarchies between Western grant holders and local researchers, often with the effect of reducing or erasing the voice of local scholars and centering Western concepts and framings (Marat and Aisharina 2021). There is considerable pressure on local scholars to shape their research to conform to Western interests and “ways of knowing and being” (Kaczmarek and Ortmann 2021).

There is undoubtedly work to be done at the global level, challenging disciplinary hierarchies and a persistent downgrading of “particularistic” AS knowledge to give more voice to local researchers (Kuzhabekova 2020). However, epistemic hierarchies are not the only factor impeding the production of knowledge—and theorizing from that knowledge—that is truly contextualized and localized, not simply reproducing a Western gaze on the “non-West” (Kamal 2020). The case of Central Asia shows how the development of autochthonous critical scholarship can be impeded by a complex interaction between Western-centric global epistemic structures and local constraints. Local socio-economic conditions, but also political pressures in authoritarian and semi-authoritarian societies, are entangled with global epistemic politics in ways that undermine locally rooted critical theorizing. After the Soviet collapse, the combination of Western theories and scientific development initiatives, Soviet colonial legacies, and local authoritarian contexts impeded the growth of critical social science scholarship in Central Asia. That said, there have also been continuous attempts by local scholars to conduct critical work, and we propose ways in which the preconditions for localized and contextualized autochthonous theorizing in Central Asia could be strengthened.

*Authoritarianism, Precarity, and Western Paradigms: The Local Production of Central Asian Studies*

A “late entrant” to AS, Central Asian studies emerged only after the Soviet collapse, at a time when Western universalist framings of regional developments were at their peak. The dominant paradigm of “transition to democracy and market economy as universal process with regional variations,” itself a response to the Soviet collapse, was also applied to Central Asia—and shaped the newly reconfigured (and in the case of IR and political science, new) social science disciplines in universities across the region (Amsler 2007). Western understandings of the region not only started from universalizing assumptions about democratic transitions but simultaneously borrowed from Soviet orientaling legacies to explain why Central Asian countries deviated from these assumptions. In Soviet times, the region had been studied through an anthropological lens, implying that these were pre-modern, “backward” societies (Ohayon 2016). This anthropological research influenced early political science framings when Central Asia began to attract Western interest in the wake of 9/11 and the invasion of Afghanistan (Tutumlu 2021). Different variations of the concept of “clan politics” in particular shaped the field in its inception and explained Central Asian resistance to democratization as the outcome of divisive tribal politics (Collins 2006). This conceptualization has since been challenged and debunked but was and remains influential—including in the region itself.

A generation of Central Asian political scientists were socialized into these framings through an array of scientific development projects that gave local students access to the Western political science “canon.” This occurred through the creation of new universities and political science departments in the region (notably the Soros and USAID funded American University of Central Asia (AUCA) in Kyrgyzstan, which trained students from across the region), as well as scholarship programs for PhDs at universities in Europe and North America. Consequently, these first Western conceptualizations of Central Asian politics and security became entrenched in the local re-configuration of knowledge after communism, adopted into political science curricula across Central Asian universities and forming the basis for state examinations and graduate theses. Central Asian students found this orientaling



explanation of their world attractive, perhaps because it chimed with popular conspiracy theories. Many local scholars also adopted these conceptualizations, albeit from a different logic. A proliferation of local scholarship and popular literature on clans and kinship as of the late 1980s was in part a reflection of post-independence grassroots and elite nation-building projects aiming to rethink history and foster belonging to political communities (Jacquesson 2012). The widespread amalgamation of clan theories with kinship and political networks internalized this reductionist understanding of Central Asian politics and sidelined other ways of analyzing their dynamics.

At the same time, the simplistic generalization of “clans” also made it a suitable concept for avoiding more politically sensitive topics for Central Asian political scientists. Scholars working in the region face substantial socio-economic, but also political constraints. Research on topics such as regime repressions, protest movements or looking for other (perhaps criminal) motivations of corrupt officials can be dangerous, and cases of regime persecution of local scientists are not rare. In the context of increasing authoritarian repression, direct or indirect (self-) censorship of research is common in all Central Asian countries (Janenova 2019). All this encourages the marginalization of critical political science among scholars based in the region and a focus on topics unlikely to antagonize the state, leading to the neglect of vitally important topics such as anti-regime social movements and resistance, but also human rights abuses by authoritarian regimes, socio-economic inequalities, and elite corruption. Although scholars based in Central Asia do cover such topics, colleagues who are based at Western institutions and who are shielded from regime retaliation can afford much more open criticism.

These political pressures are reinforced by socio-economic ones. Academic jobs in the region are generally precarious, do not include research time, and salaries are so low that local scholars habitually have to juggle multiple jobs (Müller 2020). Scholars based in the region therefore have few resources for the kind of research that is wanted by established AS and disciplinary journals, such as increasing pressures for quantification and rigorous sampling. Nevertheless, there is local pressure (both from universities and governments) to publish in international journals, which in this context further discourages critical autochthonous theorizing. Most commonly, these are Western English-language journals with the usual barriers to publication by scholars from the Global South and East (Trubina et al. 2020). Publishing in these journals necessitates an engagement with existing debates and priorities speaking to Western framings of the region, shaping research topics and questions. The most readily available alternative—Russian-language journals published in Russia—may not have the same barriers to access, but come with their own epistemic politics, not least reactionary political pressures on political science and IR in Russia itself and its own long-established orientaling gaze on the region (Kaczmarek 2020; Koplataдзе 2019).

These long-standing trends are now compounded by what could be called a “crisis of the social sciences” in Central Asia. In recent years, there has been a noticeable decline of student interest in the social sciences at universities in the region. At AUCA, student admission in the politics department has declined sharply, and there is a similar trend at universities in Kazakhstan.<sup>1</sup> This creates further funding issues for the social sciences and threatens their place at universities, making it even more difficult to sustain local institutions necessary to generate ideas and stimulate debate about pathways for political change in the region. Today, with few exceptions, universities in Central Asia do not lead public debates on challenges such as authoritarianism, decolonization, and the effects of Russian neo-imperialism, and academic research is unable to foster social change. Such debates are happening,

<sup>1</sup>Personal communication by heads of departments with A. Doolotkeldieva in Almaty, Astana, and Karaganda, Kazakhstan, November–December 2021.

but outside of universities, among critical journalists, feminist and environmental activists, and a small number of independent researchers.

### Conclusion

Against this background, there are recent signs of change, often coming from a new generation of young scholars (also trained in the West) who are much more engaged with debates around decolonizing knowledge (Kassymbekova 2022). The aim is to understand the study of Central Asia in the social sciences as producing knowledge relevant for local communities first and foremost—which is sorely needed, given regional trajectories of authoritarianism, poverty, colonialism, and geopolitical marginalization (Marat and Aisharina 2021). Much more rooted, situated theorizing could emerge from these networks, but currently there is a significant capacity problem. Sustainable development of critical scholarship in Central Asia would depend on local institutions free from authoritarian control and geopolitical interference, capable of generating locally rooted knowledge and engaging local publics about the region's most imminent challenges. This is not to neglect an impressive body of literature produced in the past decades by (predominantly) Western scholars of Central Asia and increasingly local scholars. However, in the absence of a much denser network of protected and sustainable spaces for local scholars, the necessary capacity for autochthonous critical scholarship cannot emerge. International organizations and Western states have been sponsoring programs aimed at supporting civic activism in Central Asia without addressing the underlying lack of epistemic infrastructure that limits such activism. Truly independent, long-term funding for local social science research could make a difference—and could then contribute to “globalizing” IR and political science more broadly.

### What Area Studies Controversy?

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In the same way that the conventional story of the origins of the discipline of International Relations (IR) is told from a Western-centric perspective, drawing on a particular and selective reading of European historical experience that silences the constitutive role of colonialism, race, and empire in the creation of the field (see, for example, Krishna 2001; Hobson 2012; Thakur and Vale 2019), so too the debate about the relationship between IR and area studies (AS) has played out largely in the West.<sup>2</sup> This article asks what—if any—relevance this debate has had for African IR, focusing in particular on the South African case.

While the subject here is not AS per se but rather how it relates to IR, it is important to note that AS is not an established field in Africa, with departments or institutes dedicated to the study of particular areas of the world being the exception rather than the rule.<sup>3</sup> The focus here is therefore on African studies, which do have a long and contested history on the continent.<sup>4</sup> While it usually refers to studies and discourse on/about Africa rather than knowledge produced about or from Africa by Africans, the discussion around African studies in the African context led scholars like Hountondji to call for a more normative approach, arguing

<sup>2</sup>“The West” here is used as a shorthand and not meant to imply that it is a homogenous category, as there are major differences in how the debate has played out in the US and Europe. In addition, disciplinary dynamics have also resulted in the marginalization of certain non-mainstream approaches within “the West.”

<sup>3</sup>The recently (2018) created African Centre for the Study of the United States at the University of the Witwatersrand is perhaps an answer to the call that “it is also time for North America and Western Europe to be designated as “Area Studies” as well” (Chege 1997, 136).

<sup>4</sup>See Mudimbe (1988), Zeleza (1997, 2006), Nhlapo, and Garuba (2012).

that “In Africa it is or should be part of a wider project: knowing oneself in order to transform” (2009, 129).

With regards to IR, the Area Studies Controversy (ASC) has largely played itself out outside of Africa. For example, while [Abrahamsen \(2016\)](#) holds that African studies “is showing an increasing rapprochement with IR,” she gives examples of UK-based scholars who work on the cusp of IR and African studies. This does not necessarily apply in the same way to African studies scholars based in Africa. As [Chege \(1997, 133\)](#) argues, “From the point of view of African social scientists working in Africa . . . the raging controversy over whether to integrate AS into wider International Studies programs, under an overarching paradigm, is not a priority.”

*(South)African (studies) IR*

In trying to understand the relationship between African studies and IR in South Africa in particular, it is important to make the distinction between AS scholars whose focus is the study of other parts of the world from an IR perspective and those who see themselves as IR scholars but for whom the area that they live in forms the basis of their inquiries. The majority of South African IR scholars arguably fall into the latter category—while they would not necessarily see themselves as Africanists, they draw on their knowledge of (South) Africa to inform their scholarship. The following statement by Amitav Acharya would undoubtedly resonate with most:

To be honest, when I first came across this so-called debate, I could not quite understand what the fuss was all about. To me there was no clear separation, except perhaps that IR scholars were interested in IR theory, and area specialists were more interested in concepts and theories from a variety of disciplines... The vast majority of the IR community outside the United States and the West does not care about that divide ([Acharya 2020, 47](#)).

Odanga makes a similar point in relation to the alleged African studies crisis, contending that “It is the misrepresentation of Euro-America’s monologue as dialogue” ([Odanga 2022, 5](#)). While it was never explicitly referred to as the AS/IR divide, the issue in South African IR since the 1990s has not been that AS should be better integrated into the discipline, but rather that IR scholarship has looked too much like AS viewed through an IR lens. In short, many commentators held that much of the work was largely theoretical (or, at most, applied existing IR theories to the (South) African case, with little or no theoretical innovation) (see, for example, [Taylor 2000](#); [Vale 2004](#)). This critique, of course, reflects a particular Western-centric understanding of what constitutes legitimate knowledge within the discipline of IR, with theoretical work being regarded as superior to more empirical research.

In addition, there was felt to be too much Africa in (South) African IR (see [Smith 2013](#)). Many of the concerns raised by African intellectuals from various disciplinary backgrounds have been rehashed in South Africa over the past three decades. The lamentations that African scholars studying in the United States and Europe fell into the trap of only working on African topics were repeated in South Africa following the end of apartheid in 1994. The reasons were many, including a sense of responsibility and obligation that scholars needed to focus their intellectual energies on doing policy-relevant research that addressed South Africa’s multiple challenges. In the context of IR in particular, this meant an almost exclusive focus on South Africa’s foreign policy and the ensuing challenges of re-entering the global community. This was accompanied by a focus on renegotiating the country’s relationship to the rest of Africa, with the “African agenda” that became the hallmark of official foreign policy being reflected in the teaching and research. All of this was incentivized through funding institutions, which made a focus on South Africa and Africa a requirement.

One might say that, as a result, many IR scholars in South Africa were doing and continue to do IR through AS. This is not exceptional—IR scholars in the United States who work on US foreign policy or question of US security are also essentially engaging in what, paraphrasing [Hountondji \(2009\)](#), one might term ethno-IR. The difference is that their insights are regarded as being universally applicable, and therefore form the basis for universal theorizing, while scholars in the rest of the world who are focusing on the states or regions in which they are located are seen as being engaged in narrow area-specific, and a-theoretical, or at most theory-applicatory research.

### *The Dangers of Essentializing*

This has implications for the global(izing) IR debate, which questions the applicability of existing Western-centric IR frameworks and instead calls for the development of local and area knowledge inspired alternative understandings and conceptual frameworks. In essence, this requires home-grown theories that emerge from local contexts, which in turn depend on AS expertise. This approach also faces major challenges related to the potential for essentializing differences based on geo-cultural factors. This is a trap some of the recent student protests in South Africa fell into, resulting in an essentialization of Africa and a concomitant shortsightedness about the potential wider applicability of insights from the continent. Preeminent African intellectuals like Achille [Mbembe \(2001\)](#) came under fire for highlighting the potential dangers of nativism, thereby undermining the potential for Africa to be regarded as a place from which broader theoretical insights could be generated rather than maintaining a myopic view of African solutions (or theories) for African problems (only). The challenge is to emphasize the importance of drawing on insights from the study of Africa not as examples of exceptions or merely to understand problems specific to Africa, but rather to understand Africa as an articulation of the global.

Beyond the African studies/IR relationship, there is the broader question of Africa's relationship to IR (see, for example, [Cornelissen et al. 2012](#)), which is related to but also separate from the former. Africa is "IR's permanent "other," serving to reproduce and confirm the superiority and hegemony of Western knowledge, epistemologies, and methodologies" ([Abrahamsen 2016](#), 126). In the same way that the debates about Africa and IR should not be conflated with the ASC, the move towards globalizing IR should not be conflated with the IR/AS debate, although there are clear overlaps and issues of common concern.

In summary, the AS/IR divide<sup>5</sup> reflects a Western-centric understanding of what IR as a discipline constitutes. The idea that the study of the international relations of a particular place or multiple understandings of and engagements with "the international" do not constitute IR if it does not involve viewing the world from the vantage point of the West, prioritizing Western historical experiences and concomitant conceptual frameworks and theories, and employing sources and methodologies that are regarded as suitable for producing legitimate knowledge about the subject matter of IR (as determined by whom?) is one that should be challenged on every front. The overarching challenge remains that African scholars working on questions of IR continue to be seen as experts on Africa or African IR instead of as IR scholars first and foremost. This characterization is repeated by well-meaning Western-based IR scholars who want to "bring Africa into IR." Instead, the main undertaking for (South) African IR is not bringing in more of an Africa focus and fitting this into existing IR frameworks and theories, but rather drawing on the existing Africa focus and using it to question existing frameworks and propose alter-

<sup>5</sup>It should be noted that while considerable progress has been made in the field of new area studies that in many ways transcends this debate, and there have also been some encouraging developments in IR towards recognizing the value of contextual knowledge, in mainstream IR the divide remains very palpable.

native understandings of not just African but global issues that are relevant beyond the regional context.

### **Trajectories in Middle East Studies in the United States and the Middle East and North Africa**

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What does Middle East studies (MES) look like when viewed from the region itself versus its birthplace in the United States? And how do evolving global institutional knowledge landscapes shape and reshape the profession and the field? In exploring these questions, MES, and area studies (AS) more generally appear not as coherent and self-contained fields but rather as complex arenas of crisscrossing, converging, and diverging scholarly interests, approaches, and theoretical commitments.

#### *US Area Studies: What is Left to Say?*

Since the 1990s, there has been a plethora of writings about AS, its history, its limitations, its demise, and its rebirth (Shami and Miller-Idriss 2016). It would seem as though there is little left unsaid. However, this particular legacy and genealogy of how the world is studied and divided up into units of specialization continues to structure theories, methodologies, and, most importantly, pedagogies and training opportunities in universities. This is partly because universities are slow-moving, slow-changing entities, and, much like a “coral reef,” they grow by accretion and accumulation (Stevens et al. 2018, 19). Earlier structures do not disappear but get overlaid and grouped in different ways. In the 2000s, global studies institutes, centers, and programs were added to the variety of area and regional studies centers on US campuses, and new senior administrative positions for “Global Studies” were created at leadership levels. Many universities expanded structurally into various parts of the world through satellite campuses, global centers, and other types of institutional investments under the rubric of the “Global University.”

Stevens et al. (2018, 10) suggested three schemata for how the US university has studied the world over time: the “civilizational university,” the “national-service university,” and the “global university.” AS is a uniquely US artifact forged at the “national-service university” after WWII with the rise of the United States as a global power. It came into being through government and private foundation investments and divided the world according to US national security categories (Ruther 2014). A case in point is the division of “Asia” into East, Southeast, South, Central, and West—each institutionalized in university teaching and research as separate and distinct with a different “main” language and “main country,” for example, South Asian studies privileged India, Hindi, and Hinduism. In addition to sundering real-world continuums and connections, these configurations created centers and peripheries within each AS field.

#### *Genealogies and Histories*

MES was a latecomer to United States AS, with the Middle East Studies Association being founded in 1966. What constitutes MES on a particular campus, let alone across the United States as a whole, is a complex landscape. For example, at the University of Chicago, the “Middle East” is an object of study at the Oriental Institute, the Department of Near Eastern Studies, the Center for Middle Eastern Studies, as well as a concentration within disciplines such as anthropology, comparative politics, religious studies, and also training and research projects within faculties of law, global health, etc. In mapping MES on this single campus, we find

multiple structures that reflect different historical periods of the university and different paradigms that structure the unit of study differently in terms of its geography, its chronology, its data sources, its prestige objects of investigation, and so on. The disciplines further structure regional research into various prestige zones (Abu-Lughod 1989).

The arguments for and against AS have been framed in terms of universalism versus particularism, theory versus data, and disciplines versus AS. While within particular AS fields, geographies may be interrogated and disputed, in the debates on AS in general, it is not geographical designations that are questioned but rather the relevance of particular paradigms. This, wittingly or not, perpetuates essentialist readings of cultures as separate, self-contained units with distinct boundaries instead of a focus on historical entanglements, connections, circulations, and convergences that result in constantly shifting and reshuffling geographies.

Three formative genealogies and structures shape AS fields:

- The previous academic history of studying that part of the world, including the legacies of Orientalism, ethnology, linguistics, archaeology, religious studies and so on.
- The structure of teaching and specializations in terms of university departments, units, programs, and degrees.
- The constitution of AS as *national* fields is driven and funded by national interests as much as (if not more than) by scholarly trends and paradigms.

When we compare MES with other US fields such as Latin American studies or Soviet/post-Soviet studies, we can see significant differences resulting from these factors. This includes:

- The different mix of disciplines dominant in the field, depending on intellectual genealogies: in some fields, these are history and literature, while in others it is political science and International Relations, and yet others are defined largely by anthropology.
- The different relationships between the academic field and US foreign policy: these may be adversarial or collaborative and shift with succeeding generations of scholars. Important here is state funding, think tank positions, media perceptions, and the circulations of prominent individuals between the university and these other institutional spheres.
- The relationships between US scholars and those in the regions themselves: definitive here are the roles of overseas US research centers, language training programs, the availability of exchange and mobility opportunities, and, more recently, satellite campuses and global centers abroad.
- The ways in which the academic field is implicated at moments of geopolitical crisis (the fall of the Berlin Wall, the dissolution of the USSR, 9/11): Does the field get “blamed” for national unpreparedness? Does funding flow or get withdrawn from academia due to such events?

#### *The View from the Middle East*

Important differences also arise from the contributions of scholars from the regions themselves. Latin America enriched theoretical frameworks on development and on democratic transitions. South Asia brought in Subaltern studies as a radical new framework for historical social sciences. The critique of Orientalism by MES

scholars in the region and the diaspora was transformative across many fields of study.

Such possibilities arise out of the different orders of relationships—epistemic, political, and structural—between US academia and world regions. But can we talk of MES in the Middle East itself? The region saw the formation of “civilizational” fields of study in nineteenth- and early twentieth-century institutions of higher education (El Shakry 2007). However, the AS paradigm did not take root in post-colonial national universities and only partially at the American universities in Beirut and Cairo, as well as at the new satellite campuses. Centers for regional research do exist at some national universities, however, rarely offering degrees or specializations. The social sciences and humanities tend to be taught in civilizational and national terms, with a focus on the country itself. Research conducted by students and faculty is almost always done at home, and there are very few opportunities to carry out comparative research.

This is not to argue that there *should* be US-style MES in the Middle East itself. While it is important, indeed crucial, for students and scholars to transcend their national borders and engage with transnational and transregional approaches (Shami 2023), there is no need to inherit specific tensions between the universal and particular, theory and ethnography, discipline and area that are not, and should not be, transportable into other academic and intellectual contexts. The study of the Middle East in different European countries also has its impacts, shaped as it is by particular academic histories and structural arrangements. That fact that many European countries have colonial histories in the region also leads to different geographical configurations and types of entanglements, historical memories, and relationships to scholars and research institutions in the region (Pace and Völkel 2023). The same is true of the study of the Middle East in Russia, Japan, and other countries.

At the same time, US-based MES is hegemonic and heavily impacts research agendas and academic debates within the region itself. Therefore, an understanding of the history and genealogy of its thematic and structural concerns is important, without, however, taking on the same arguments and battles. Rather than reproducing US debates in other contexts, the unpacking of structural and thematic hegemonies is integral to emancipatory social science. This includes dialogue with critical works that seek to reconstruct MES from post-Orientalist, decolonial, and transregional approaches. Such unpacking, however, requires strong academic infrastructures and networks, which are sorely lacking, and increasingly restricted, in the region (Bamyeh 2015). Other challenges emerge out of the civil unrest stretching across the whole region, from Iran to Morocco, the continued colonial and external interventions in several countries, and a general deepening economic crisis. The authoritarian backlash against popular uprisings has meant a further shrinking of the public sphere and increased controls on the freedom of speech and the right to research.

Under these conditions, the possibilities for nurturing transregional academic innovation, dialogue, and exchange appear bleak. And yet, we see all across the region a flourishing of knowledge production projects, mostly informal and outside established institutions, collectively forming a strong voice for alternative visions and futures of the region (ACSS 2023). These provide new grounds for scholarly collaborations that would transform AS and many other fields as well.

*Globalizing Area Studies: Transregional and Transdisciplinary Approaches*

One would expect the “global university” to position the study of world regions as a central project. AS, with its international expertise and connections, should be well poised to lead efforts to globalize the United States university. Instead, the global move of the university is led by professional schools, reflecting their increasing prominence on US campuses (Friedman and Miller-Idriss 2015). Public health

and medicine, engineering, law and public policy, agriculture, and so on, seem more modular and exportable, given their normative appeal to “universal” truth and value. Recipient countries often welcome these academic encroachments as “technical” and “scientific” fields that are supposedly free of colonial or imperial attributes and supposedly neutral towards issues of culture and identity. Yet we also see across these campuses a heightened and bottom-up demand from faculty and students for a reconfigured social sciences and humanities. The intended and unintended consequences of these academic experiments in globality are deeply significant. However, globality is also an *interrupted* process, as national crises pull many countries, including the United States and Europe, back into inward-looking and conservative priorities that are then reflected quite directly in academia.

Within this evolving academic and regional landscape, there are new opportunities for MES to reinvent itself as a truly global field of knowledge. This is a necessary but not straightforward project given the complexities discussed above—it is, however, the way forward.

### Area Studies and Sociology in Germany: From Subordination to Collaboration

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Relations between sociology and area studies (AS) have not been free of tensions. Nevertheless, the kind of Area Studies Controversy observed in the case of political science and international relations has never taken place in sociology at least in Germany, the case I focus on in this contribution. The history of relations between sociology and AS in Germany can be roughly divided into two phases. The first phase, from about 1960 to the 2000s, is the period of consolidation and expansion of AS and is marked within sociology by the hegemony of modernization theory.<sup>6</sup> In this period, the asymmetrical power relations between sociology and AS defined a clear division of labor: Sociology provided the relevant theoretical references and methods, while AS were expected to apply, in empirical research in their respective regions, the canonical knowledge of the discipline.

Since the first years of the twenty-first century, the situation has changed. Due to the theoretical weakness and lack of empirical grounding of the responses of sociology to the challenges for the discipline represented by globalization and, more recently, climate change, AS have grown in importance for German sociology, no longer as a field of application of sociological theories but as a central partner in the endeavor of building a more complex and consistent understanding of global dynamics. Accordingly, AS have occupied a relevant place in German sociology’s efforts to overcome some of its epistemological, theoretical, and methodological blind spots in order to continue existing as a discipline capable of producing knowledge relevant and distinct from that offered by other disciplines.

This general argument is developed in this contribution in the following steps: Initially, I discuss the first phase of relations between sociology and AS. In the second part, I seek to characterize the changes observed in these relations since the first years of the twenty-first century. Finally, in the conclusions, I explore the lessons learned from the case under consideration for the general discussion on the tensions and relations between AS and social sciences in a broader sense.

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<sup>6</sup>AS in Germany, as in other European countries, have built on knowledge archives (libraries, museums, and art collections) created during colonialism. Even the Science and Humanities Council, the main science policy advisory body in Germany admits that colonial legacies “sustainably influenced the development of area studies” (*Wissenschaftsrat* 2006, 10).



*Area Studies and Modernization Theory*

The emergence and consolidation of AS in the United States and, later, Europe in the context of the Cold War coincides with the period of the expansion of modernization theory worldwide.<sup>7</sup>

Drawing on Knöbl's (2001, 32–34) accurate investigation, in modernization theory, modernization refers to the transition from traditional to modern societies, with modernity and tradition considered antinomic concepts. Accordingly, particularistic and functionally diffuse attitudes and values preponderate in the “Third-World societies,” while secular and universalistic values dominate in Western modern societies. For modernization theorists, American society in the 1950s and 1960s was “the destination of development for poor countries” (Knöbl 2001, 34).

For AS, both an analytical task and a political mission derive from the premises of modernization theory. The analytical assignment is to investigate the deficits of modernity in African, Asian, and Latin American societies, that is, to assess the distance between the institutions, values, and sociability found in these regions and the “Western standard” they should achieve. Politically, it was up to AS to contribute with governments and development agencies to *modernize* the “backward countries,” that is, to transform them into more faithful copies of the idealized “Western model.” In Germany, this led to close cooperation of the departments of “sociology of development” or “sociology of developing countries” at universities with state agencies and civil, religious, and political organizations interested in promoting development in the “Third-World” (Ruvitso 2019, 95–96).<sup>8</sup>

*Area Studies and the Renewal of Sociology*

Despite consistent critiques it had received hitherto, modernization theory experienced, also in Germany, an unexpected revival in the 1990s, when different theorists sought to respond to the end of real socialism by constructing a sociological interpretation of globalization. Although more complex and sophisticated than the original modernization theory, global modernization theorists reproduced the teleology of the original theory, according to which “recuperative modernization” would westernize the “rest” of the world. This is evident in the works of the most influential German theorists of that time, such as Ulrich Beck (1997) and Jürgen Habermas (1998), who, based on their observation and idealized interpretation of German society, expected that “second/reflexive modernity,” the “rationalization and secularization of the lifeworld,” and liberal democracy would reach all world regions.

The normative bias and empirical deficits of these theories became immediately obvious, creating a new space of influence for AS. Correspondingly, AS have abandoned more and more their position as field of application of theories and methods developed in the canonical social sciences to become a kind of guilty conscience of sociology. As discussed in Costa (2021), under the influence of postcolonial studies, AS started following with critical distance sociological generalizations that ignore empirical and scholarly developments in the Global South.

<sup>7</sup>In this paper, I focus on developments observed in West Germany. For lack of space, I do not discuss area studies in East Germany during the Cold War, whose academic and political impacts were considerable.

<sup>8</sup>Modernization theory also became the dominant macro-sociological paradigm within the countries referred to today as the Global South. An important exception is dependency theory. By rejecting the premise of a national (endogenous) development, the dependency approaches originally developed in Latin America represent the first internationally recognized critique of modernization theory. However, it is necessary to distinguish the different dependency approaches: While F. H. Cardoso and E. Faletto admitted that foreign investments could bring “Third-World” countries into the Western development path, Marxist dependency theorists such as A. G. Frank and R. M. Marini insisted that the established global value chains permanently reproduce the subordinated position of the poor countries in global economy, as I demonstrated in a previous contribution (Costa 2019).

Moreover, the emergence of competing interpretations of globalization created new opportunities for cooperation between globalization theorists and AS scholars dedicated to both studying a specific world region and transregional research (Steger 2018). Particularly illustrative of this new collaboration are the theory of multiple modernities, initially designed by Eisenstadt (2000), and later expanded also by German sociologists (e.g., Knöbl 2007), and the theory of entangled modernity, outlined by Randeria (1999). According to the multiple modernities approach, modernity, despite having a common core, develops very differently in various world regions. The entangled modernity approach, for its part, seeks to do justice to the linkages between the different world regions for constituting modernity. This theory addresses, in particular, global modern entanglements such as colonialism and slavery, which have been systematically ignored by sociology. Beyond their differences, both approaches, still very influential within sociology, were elaborated in close dialogue with AS and depend for their development and improvement on the continuity of this collaboration. In this context, the relations between AS and sociology have changed diametrically in Germany as AS left its place as a peripheral subfield of sociology to be integrated into the center of the production and development of social theories.

A more recent and for AS promising development refers to their contribution to consolidate sociology of the environment and of climate change. Cooperation between sociology and AS at this level in Germany has encompassed at least two complementary focusses. The first one refers to the discussion on the commodification of nature, which has its roots in Marxist dependency theorists and their problematization of the insertion of former colonized regions into the world economy as global commodity supplier. Today, research seeks to understand the connections between environmental degradation and dispossession in the former colonies and the search for a “green transition” in Europe (e.g., Backhouse et al. 2022). By exploring such transregional connections, AS make a contribution to sociology for overcoming one of its congenital defects: methodological nationalism, i.e., the limitation of analytical units to national borders.

The second point of intersection between environmental sociology and AS, and more particularly Latin American studies, concerns the discussion of indigenous ontologies as a way for sociology to overcome another of its innate deficiencies: anthropocentric bias. Against the sociological belief that the environment is a mere empty space to be colonized by human action, these “other ontologies” reject human exceptionalism and insist that life on our planet is based on webs of interdependence involving all living beings (Adloff/Hilbrich 2021).

### *Conclusions*

Cooperation between AS and sociology in Germany, the case discussed in this short article, seems to be more constructive today than relations observed in the other cases discussed in this forum. These positive developments can be explained by both institutional and scholarly factors. At the institutional level, new funding opportunities (e.g., AS funding line created in 2008 by the German Ministry of Education and Research), the restructuring of research institutions (e.g., German Institute of Global and Area Studies recreated in 2006), and new cross area associations (e.g., Forum Transregionale Studien) among other institutional developments have contributed to create new spaces for cooperation on an equal footing between AS and social sciences and particularly sociology. Scholarly, research developed within AS have proved to be productive for sociology for overcoming some deficiencies that have become more and more evident, as discussed in the framework of critical concepts such as Eurocentrism, methodological nationalism, and anthropocentrism.

Obviously, this new position should not be taken for granted. To continue occupying a prestigious place in sociology and in social sciences in a broader sense, AS,

as noted by Mitchell (2004, 109) in the case of US Middle Eastern AS, need to continue producing outstanding knowledge able to “provincialize social sciences,” that is, help social sciences overcome their (post)colonial shortcomings. From an institutional point of view, it is necessary to continue fostering research networks that integrate AS concerning various world regions and sociologists linked to different disciplinary fields to study topics of common interest. In Germany, AS also urgently need more sustainable institutionalization formats and funding schemes. The current productivity of AS there is based, to a large extent, on temporary positions and short-term project grants. For consolidating their current academic relevance, German AS need more permanent professorships and stable research structures that make scholars and scholarship less vulnerable to circumstantial shifts of political priorities.

### Speaking Across Areas: The South–South Travel of Concepts as a Neglected Dimension of the Area Studies Debate

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Much of the debate about area studies (AS) has focused on the relation between individual academic (sub-)disciplines such as political science or International Relations (IR), on the one hand, and AS, on the other. One important set of questions concerns the application of theories and concepts of political science that are regarded as universal, while de facto originating from studies of the Global North, to countries in the Global South (Mehler 2020, 68–69). This debate, important as it is, tends to miss a feature that characterizes both discipline-oriented scholarship and AS: a lack of scholarly exchange between area specialists working on different regions of the Global South. Both the very nature of context-sensitive, area-focused research and the predominant orientation to relate AS to northern-centered disciplinary debates imply that the respective regionally specific AS communities are isolated from each other. Conceptual travel between world regions from the Global South hence remains scarce (Engels and Müller 2019, 73). As D’Amato et al. (2022, 161) have argued, the interregional travelling of concepts and theories can help “overcome the main sources of suspicions between disciplinary scholars and area specialists,” including “theoretical “parochialism (that is, the same phenomenon being discussed in different regional settings, using different terminology)”, and “the geographic confinement of academic communities (rarely liaising each other on a ‘South–South’ basis and therefore replicating a post-colonial dimension of knowledge production and dissemination).” And yet, until today, AS are rather characterized by “conceptual parallelism under restricted horizons” (von Soest and Stroh 2018, 71).

In this contribution, we discuss the South–South traveling of concepts as an ignored dimension in the AS debate and one that we think should be seen as an essential part of a comparative AS research agenda (Ahram et al. 2018). Focusing on social movement studies (SMS), we argue that this research field has seen lively debates on whether and how northern-centered theories should be applied to different regions of the Global South but has yet to tap into the potential offered by the deliberate appropriation of concepts developed with a view to one region of the Global South by scholars working on another region.

*The AS Debate in Social Movement Studies*

The relation between the overall study of social movements and AS research on protests is marked by a critical, albeit fruitful, tension. Starting from the observation that all major social movement theories (SMT) have largely emerged from studies on the Global North, AS scholars working on regions of the Global South have questioned the applicability of the different theories and concepts (Beinin and Vairel 2013; Rossi and van Bölow 2015; Engels and Müller 2019).

A key theme in these debates has been the rationalist origins of SMT. This resulted in the neglect of the “cultural politics” of social movements (Alvarez et al. 1998) as well as in the exclusion of movements that pursue religious and ethnic goals and thereby do not fit the modernist view of rational collective action (Beinin and Vairel 2013, 3–4; Engels and Müller 2019, 73). Overall, theory-building in the study of social movements in and on individual world regions has mostly aimed at applying, revising or replacing SMT as developed in the Global North. Theoretical innovations that have made it into global SMS include the poststructuralist approach to social movements from Latin America (Alvarez et al. 1998) or the concept of non-movements as developed for the Middle East by Bayat (2010).

Still, for the most part, these debates take place separately within the different AS communities. Very rarely do scholars draw on empirical experiences, conceptual proposals, and theoretical propositions developed for other regions of the Global South. This can be seen in area-specific studies on Latin America (Rossi and van Bölow 2015), the Middle East and North Africa (MENA) (Beinin and Vairel 2013), or Sub-Saharan Africa (Engels and Müller 2019), as well as in volumes that bring together contributions from different regions of the Global South (Motta and Nilsen 2011; Fadaee 2015). That concepts in SMS rarely travel from South to South is curious given that structural context variables that have been identified as crucial for social mobilization are much more similar between, for instance, Latin America and MENA than between either of those regions and the Global North (Weipert-Fenner 2021, 571; Weipert-Fenner and Wolff 2020).

*The Interregional Travel of Concepts*

As Edward Said’s reflections on traveling theory and the subsequent debate emphasize, theoretical concepts that travel are not simply applied to new contexts but are “accommodated” or even “transformed” in the process (Said 1983, 227). When a concept travels from one region to another, it therefore not only may help better grasp a given phenomenon in the latter region, but the traveling can also facilitate a revision of the concept so that it grasps broader, cross-regional dynamics. Our contribution to this traveling debate concerns the “travel routes” that all-too rarely—at least in our area of expertise—run between regions of the Global South. In order to illustrate the fruitful South–South travel of concepts, this section discusses the concept of “incorporation” based on previous research on socioeconomic protests in the MENA and Latin America, which was conducted by a research team made up from scholars from Germany and the MENA and also involved close communication with Latin American scholars (Weipert-Fenner and Wolff 2020).

One important concept that has been used to explain the Arab Uprisings of 2010 and 2011 as well as the persisting discontent across the MENA is the (broken) “authoritarian social contract.” Understood as a tacit agreement between authoritarian regimes and the general population, in which regimes compensated the denial of political participation by socioeconomic benefits, this “contract” had been gradually broken with the neoliberal dismantling of key policies of socioeconomic inclusion and state-corporatist representation (Loewe et al. 2021). This idea of a “social contract” is, in many ways, in line with the concept of “incorporation,” as developed by Ruth and David Collier (2002 [1991]). While the Colliers analyzed the political in-

corporation of labor movements throughout Latin America during the first half of the twentieth century, scholars recently revived this concept in order to make sense of more recent sociopolitical dynamics since the mid-1990s (Silva and Rossi 2018). These authors have argued that Latin America has been experiencing a new incorporation crisis, ushered in by a period of neoliberal disincorporation, that, with the election of left governments since the early 2000s, has given way to a second wave of political incorporation. In contrast to the first wave, incorporation this time concerned a much more heterogeneous set of socioeconomically disadvantaged social groups that, in the Latin American debate, is usually called the popular sectors.

While the notion of a social contract tends to look at relations between the state and society at large, the incorporation concept turns our attention to the specific marginalized but mobilized groups that claim incorporation—usually in both political and socioeconomic terms. Since the times of the old “authoritarian social contract,” the concrete organizations and movements and their socio-structural basis have clearly changed, with organized labor today being only one part of a much more heterogeneous set of socioeconomically disadvantaged social groups. Reconceptualizing the current renegotiation of a social contract in the MENA as a struggle over incorporation also helps understand why the establishment of a democratic regime—such as, at least temporarily, in Tunisia—has proved insufficient to “tame” socioeconomic protests. As research on Latin America has amply documented, the existence of democratic institutions does not simply “solve” a crisis of popular sector incorporation, even if it does offer an opportunity structure that facilitates struggles for incorporation. In societies with stark structural inequalities (whether in Latin America or MENA), meaningful popular-sector incorporation requires formal and informal mechanisms that give disadvantaged social groups an institutionalized, collective access to and voice in the political arena—in addition to their formal inclusion as citizens with individual political rights.

Appropriating the incorporation concept for the study of the MENA also promises important insights for the overall theorization of incorporation. This is particularly due to two empirical biases that concern the study of the second incorporation in Latin America. First, in contrast to existing research on Latin America that has had only democratic regimes to analyze (Silva and Rossi 2018), the MENA enables us to study how the second incorporation crisis is playing out under conditions of autocratic regimes. Second, in Latin America, incorporation has basically been analyzed as a leftist agenda that comes with socioeconomically redistributive policies. Studying the MENA region, in contrast, promises insights into what happens to incorporation crises when the mobilization of socioeconomically disadvantaged groups combines with the struggle for incorporation of rather conservative religious (Islamist) groups.

### *Conclusion*

In this contribution, we have suggested that both discipline-oriented and area-focused scholars tend to ignore the potential that lies in the South–South travel of concepts and theories. A brief discussion of SMS has shown that area specialists mainly relate research on “their” world region to the northern-centered, global debate. Drawing on one example from our own research, we have argued that the appropriation of concepts developed with a view to one region of the Global South by scholars working on another region promises new insights both for the specific region(s) at hand and for overall concept development and theory-building. While we could discuss neither power structures in academic knowledge production nor our own positionality in this regard, we would like to conclude by stressing that this call for South–South travel of concepts should of course be pursued by scholars with origins from and based in the Global South as well as in the Global North.

## Area Studies and Democracy Research: Countering Modernization Theory from the Margins

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Mainstream US political science turned away from area studies (AS) in the 1990s for two main reasons: the enthusiasm that many elites shared for globalization under Western leadership after the impression that liberal democracy had won over socialism, and the ways in which the increasing quantification in political science perpetuated the dominance of modernization theory and liberal democracy. The Area Studies Controversy is less a dispute about areas but rather about theoretical underpinnings and methodology.

Coming from the fields of Southeast Asian studies and comparative democracy research, we find that the much-discussed crisis of liberal democracy is also a crisis of democracy studies. Despite its many academic obituaries, the modernization paradigm continues to sideline area-specific expertise and alternative conceptions of democracy. There is not only a crisis of liberal democracy but rather a crisis of democracy studies in its current fashion. Democratic research should go beyond a predominant preoccupation with one-sided utilization of quantitative methods and display a greater sensitivity for regional specificities.

### *Functions of Area Studies*

Different AS have their own genealogies and relationships to other disciplines (Szanton 2004; Mirsepassi et al. 2003). Depending on their context, they fulfill different functions, such as facilitating multi- and transdisciplinary approaches and the study of various societies in their respective contexts in response to the Eurocentric parochialism of established academic disciplines.

In the United States, AS scholars have succeeded in integrating some area expertise into scholarly debates (Szanton 2004), but these gains have largely been made in anthropology and history and less in political science, where Eurocentric categories prevail. In Germany, area expertise related to the Global South remains relatively detached from the stubbornly parochial political science departments, where teaching curricula focus on the EU and the US and language expertise beyond German and English is rare, as are cross-departmental affiliations and in-depth case studies beyond Europe and North America.

One reason for this lies in the genealogy of the disciplines: European AS of Asia and the Middle East build on Oriental studies, which gave AS in Europe “something of an anchor against political winds” (Scott 1992, 2).<sup>9</sup> It also gave area specialists little reason to produce knowledge in the service of the mainstream social sciences. Of course, some area specialists are also disciplinary scholars, either working towards fruitful connections to their other disciplines and to facilitate the few thin bridges over the described canyons or turning away from them with a certain degree of frustration caused by persistent Eurocentrism. Other area specialists have not been trained in a particular academic discipline and are fully immersed in the transdisciplinary potential of AS. These scholars have even greater difficulty making their findings translatable into and relatable to the debates in the mainstream disciplines.

A second reason for the persistence of the divide between the study of politics in the established social sciences on one side and area specialist analysis on the other

<sup>9</sup>For a more detailed discussion of Asian AS in Germany, see Schäfer 2020.

lies in the critical self-reflection prompted by Edward Said's (1978) criticism of the connection between AS and imperialism and the reflexive turn in anthropology (Beng-Huat et al. 2019). A range of scholars promoting "new" or "critical" AS discuss questions of what legitimately constitutes an "area" in which context and related to which particular hierarchies within knowledge production. These conversations are held mainly with anthropologists, sociologists, and historians, but political scientists are rarely found (Heryanto 2002; Derichs 2017; Jackson 2019).

Finally, another key reason for the divide between AS and mainstream political science, and the one we want to focus on here, is the continued hegemony of modernization theory assumptions in political science inherent in democracy studies.

*The Hegemony of Modernization Theory and Its Quantification in Democracy Studies*

Reports of its death have been greatly exaggerated, and the irrepressible modernization paradigm continues to undergird large parts of comparative political science and democracy scholarship. These fields matter because they inform the allocation of funding framed as "development aid" and "democracy promotion" and because they form the basis of education for many future political decision-makers.

Quantification affects democracy studies in two ways. Firstly, quantitative methods have severely marginalized political theory and qualitative and hermeneutic-interpretive methods (Brown 2010; Kasza 2010). Secondly, the "publish or perish" imperative incentivizes predictable research and the scholarly affirmation of mainstream perceptions. Combined with increasingly competitive and precarious working conditions (Vatansever and Kölemen 2022), the modern structure of the academic system encourages scholars to produce as many papers as possible out of a single data set rather than invest in risky research, including laborious language learning and fieldwork.

In the field of comparative politics and democracy studies, scholarship outside the dominant modernization paradigm has waned in significance. Theoretical and empirical analyses informed by, for instance, the Frankfurt School, French post-Marxism and poststructuralism, and Italian political thought have been marginalized. Similarly, theories and methods developed in other parts of the world rarely receive attention. The political scientist and Southeast Asianist Thomas Pepinsky (2019) shows that single-country research has evolved from an emphasis on description and theory generation to an emphasis on hypothesis testing and research design. This change, he argues, is a result of shifting preferences for internal versus external validity combined with the quantitative and causal inference revolutions in the social sciences.<sup>10</sup>

Modernization theory today flourishes under different banners—"development" having largely supplanted "modernization"—but it continues to run up against limitations of the original conception. The critical engagement with the concept of modernity that Sérgio Costa (in this forum) attributes to segments of German sociology cannot be readily found in mainstream US political science or its German counterpart. The strong incentives for quantitative methods—easier and cheaper feasibility, more predictability, and higher chances of publication and citation—have the effect of reducing research on variants of democracy and of perpetuating Western-oriented categories.

One reason for the hegemony of very limited notions of democracy based on and informing quantitative survey research is the high degree to which they interplay with the political zeitgeist of the dominant actors: The missionary spirit, by which democracy studies have been characterized for much of its history, reduced democracy to its liberal variants and to state institutions. During and after the Cold War, a key aim of studying democratization and authoritarianization was to spread lib-

<sup>10</sup>In Germany, the German Institute of Global and Area Studies is a notable but tellingly unique exception.

eral democracy around the world. In this debate, the modernization paradigm led to the transition paradigm and paved the way for development and economic cooperation through democracy promotion (Carothers 2002). Most scholars in these fields understood “democracy” as a relatively clear-cut category; after a short nod to its complex history, they used a straightforward liberal definition that prioritizes institutions as the basis for empirical measurements and evaluations. This rhetoric took several blows after the failed military interventions in Iraq and Afghanistan, but despite this and the increasingly obvious multi-centricity of the world, the shift from measuring and ranking political systems to questions of resilience and vulnerabilities of democracies remained dedicated to democracy’s liberal variant. The dominance of liberalism in democracy studies remains sturdy even after scholars have identified and tried to counter it (see Wolff 2023).

Scholarship beyond the modernization paradigm exists, even within comparative political science and IR, but these heterodox voices require strengthening. In democracy studies, an example is the work by Frederick Schaffer (2014), who uses interviews and ethnography in the Philippines and Senegal to explore local meanings of the concept “democracy.” Comparing his findings to those of standardized large-N surveys, he argues that methodological problems lead survey researchers to simplify meanings and mistakenly conflate equivalent words in different languages. The global consistency of meaning of democracy discovered by survey researchers, Schaffer (2014) argues, appears to be indicative not of an overarching worldview shared by many different people all over the world but instead of the specific procedures used to record, code, and interpret interview responses. This approach and others (Berberoglu 2020; Osterberg-Kaufmann et al. 2020; Gagnon et al. 2021, 2) that employ alternative methods question the dominant theories and methods in political science. Similarly, several political theorists of various generations, such as Fred Dallmayr and Jean-Paul Gagnon, have been urging their fellow democracy scholars to look beyond a universalist understanding of democracy in its liberal-procedural form. Can alliances be forged among political theorists, ethnographically informed political scientists, and area specialists questioning modernization theorist approaches?

If overcoming provinciality and including perspectives beyond the defense of liberal democracy are desiderata in democracy studies—and we argue that they should be—and if scholars of comparative politics want to understand this increasingly multi-centric world, listening to critical voices within political science is imperative. Such voices are the natural collaborators of area specialists seeking to make area-specific insights available in the established main disciplines. The much-discussed crisis of liberal democracy can also be a moment of self-reflection.

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