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The Middle East in global modernity: Analytic polycentrism, historic entanglements and a rejuvenated area studies debate

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ABSTRACT

I argue that theories of global modernity/world society offer a promising inter-disciplinary approach for theorizing the Middle East. They provide a conceptual umbrella for a rejuvenated Area Studies debate. I turn first to earlier (inter-disciplinary) debates of that kind and then discuss how a rejuvenated debate can reach for new shores: I address the Middle East Area Studies Controversy, and then Fred Halliday's distinction between 'analytic universalism' and 'historic particularism'. Focusing on the interstices between Area Studies and International Relations (IR), I suggest that scholarship on the Arab uprisings offers insights on how to transcend this distinction by shifting to 'analytic polycentrism' and 'historic entanglements'. I identify the unpredictability of power relations and local/global horizons as central, and often marginalized perspectives brought to the fore in post-Arab uprising scholarship. I then discuss how these insights can be linked to innovative (inter-disciplinary) debates in IR that draw from historical-sociological theories of global modernity and world society, especially how the concepts of emergence and evolution as well as differentiation and subjectivity – central pillars of world society theories – can be made of use for the study of the Middle East's place in global modernity and global IR generally speaking.

KEYWORDS Middle East; Arab uprisings; area studies controversy; world society; knowledge production

1. Introduction

How to study the Middle East? And how to generate knowledge that contributes, both theoretically and empirically, to deeper understandings of what shapes politics and society in this region? This was – apart from less noble concerns revolving around disciplinary politics, struggles over academic capital and attempts to establish hierarchies between the 'general' disciplines and 'classical' Area Studies – the core substantive issue on which the Middle East Area Studies Controversy (ASC) of the late 1990s centred (Tessler et al., 1999). A detailed overview on the ASC as well as a discussion of how revisiting this

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debate could prove fertile for Middle East scholarship is provided in the introductory article to this special issue (SI) by André Bank and Jan Busse and is, therefore, not repeated here. For the purpose of this article, it is important to recall that while the hub of the original ASC was academia in the United States (US) – and there mainly political science and Middle East Area Studies. Elsewhere, such as in Europe and the Middle East, sympathetic yet critical engagement with this debate occurred particularly amongst scholars working at the interstices of International Relations (IR) and Middle East Studies (central here Bilgin, 2004; Teti, 2007; Valbjørn, 2004a). I situate myself within this literature. I suggest that the promising but still nascent ways of theorizing the region post-2011 – i.e. after the Arab uprisings since 2011 – are a call for Middle East scholarship to embark on what I refer to in this article as a rejuvenated, and this time global Area Studies debate. This should be a debate that transcends disciplinary boundaries and hierarchies, while also contributing, generally speaking, to the broader project of global IR (cf. Acharya, 2014; Valbjørn & Lawson, 2015). While I thus depart from the original 1990s ASC, I draw from a set of alternative literature – in particular key scholarship on the post-2011 Middle East – that I suggest is very insightful for such a rejuvenated Area Studies debate. It is to this debate, to which I will contribute in this article by discussing how it can be enriched by bringing in the perspective of theories of global modernity and world society.

Theories of global modernity and world society (see in detail section 4 of this article), while originating from sociology and globalization studies, have become central to many, mainly European, IR debates. In a landmark IR-contribution, two leading IR-scholars (Buzan & Lawson, 2015, p. 2) note that during the 19th century core principles of global modernity ‘pulled the world into a single system’ shaped in particular by industrialization, global markets, the rise of the rational-bureaucratic state and ideologies of progress. However, such dynamics not only produced more global interconnection, as captured in notions of multiple modernities or connected modernities (Eisenstadt, 2000). They also engendered more global inequality, e.g., through the rise of vast economic and power-related differences, expressed in imperialism and ideologies of difference, first and foremost racism. Global modernity, in other words, is a highly differentiated social order. This later dimension then is well captured by theories of world society (Luhmann, 2012; Meyer, 2000). Such theories focus on the encompassing structural consequences of what it means that all people on the globe live, for better or for worse, in global modernity. Two dimensions stand out. First, the rise of world culture as a global horizon; in other words, a globally shared belief in certain modern principles, such as the state and the value of national self-determination, the belief in actorhood and the ability to transform society through social action, but also the centrality of individual rights and other expressions of individual subjectivities (Meyer, 2000). Secondly, the notion of

world society refers to the transformation of the world from social orders that perceived themselves as stable and static (i.e. pre-modern societies) to an increasing awareness of the constant possibility of change. This has tremendous consequences for the way political struggles play out. While hierarchies persist, they can very well be scandalized and political forces, for example, throughout the Global South (Chakrabarty, 2000) can be mobilized to challenge such hierarchies. As world society theory highlights (see Stetter, 2008) such struggles take place within an increasingly differentiated political system that includes, fuels and connects political struggles at local, national, regional, and global levels – including the Middle East, where such contested practices are central from the nineteenth century until today.

The time is ripe for bringing Middle East studies and theories of global modernity and world society even closer to each other. Not least because roughly 10 years after the Arab uprisings started, some problematic but persistent assumptions about the region have been shattered – not least static assumptions about alleged authoritarian resilience (cf. the contribution by Josua & Edel in this SI). The at first sight confusing picture of post-2011 regional politics as ‘turmoil’ puts the question of how to study, and make sense of, society and politics in the Middle East back on the table. The fragile transformations and equally fragile counter-revolutions from Tunisia to Egypt, external interventions in the wars in Libya, Syria and Yemen and, finally, the re-emergence of social protests since 2019 on the streets of Algiers, Amman, Beirut and Khartoum underline this point. In that sense, ‘2011’ marks a critical juncture for scholarship on the region. Yet, new theoretical paradigms, with the exception of insightful writings often underpinned by postcolonial reasoning (see section 3), are largely missing. I argue in the following that alongside postcolonial perspectives, theories of global modernity, in particular those drawing from the notion of world society, are well suited to also make an important contribution to a rejuvenated Area Studies debate and to the project of global IR that is sensitive to Middle East scholarship.

Such a rejuvenated Area Studies debate is urgently needed. Thus, while acknowledging the positive role of postcolonial scholarship in detecting Orientalists and Eurocentric currents in Middle East scholarship, theories of global modernity and world society move one step further. They transcend such critical perspectives insofar as they offer a historically and socio-logically grounded understanding of the complex social and political contexts within which Orientalism and Eurocentrism unfold. I suggest in the following that a rejuvenated Middle East Area Studies debate in IR and beyond is well advised reflecting on the simultaneity of shared global horizons and contested practices in global modernity and to study how these factors shape the Middle East, both in the post-Arab uprising context

but also in historical perspective. I will develop my arguments in three steps.

In [section 2](#), after highlighting some core features of the ASC, I turn to Fred Halliday's (1996) proposal to rely on the virtues of both general disciplines and Area Studies. On this basis, I will draw attention to a specific take on the ASC that receives less attention by Bank and Busse, namely the contributions on this topic by Halliday (1996). Halliday offered a highly appealing *via media* formula that stressed the centrality of 'analytic universalism' and 'historic particularism' (on *via media* cf. Adler, 1997). After discussing the merits and pitfalls I see in this formula, I elaborate in [section 3](#) that developments since the Arab uprisings, as discussed in key scholarship on the post-2011 Middle East, suggest that it is useful to re-phrase this formula on two levels. Firstly, the protests of '2011' have shown the unpredictability – or contingency – of political outcomes and the ubiquitous occurrence of contestations in the shadow of entrenched hierarchies, many of them triggered by 'marginalized' actors. And, secondly, the embedding of local events, including the protests since 2011, in global, historically shaped horizons, many of them shaped by postcolonial hierarchies. This focus on the ambivalence of power relations and on the intermingling between local events and global, historically shaped horizons implicates what I term 'analytic polycentrism' and 'historic entanglements' as cornerstones of a rejuvenated Area Studies debate (on another perspective on local/global interplays cf. contribution by Weipert–Fenner in this SI). At the same time, this is a distinct way of addressing the issue of knowledge production in relation to Middle East scholarship and global IR, generally speaking. I, finally, suggest in [section 4](#) that the concepts of polycentrism and historic entanglements can be made fruitful in Middle East scholarship by bringing them into dialogue with historical-sociological theories of global modernity and world society. In this context I discuss the contributions which the study of processes of differentiation and subjectivity as well as emergence and evolution – conceptual cornerstones of world society theories – in the Middle East have for both a rejuvenated Area Studies debate and attempts to render knowledge production in IR more global.

In sum, this article, thus, speaks directly to two of the cross-cutting key issues identified by Bank and Busse in the SI's introduction. These are (1) the extent to which the Arab uprisings since 2011 serve as a critical juncture for Middle East scholarship and (2) how the way '2011' is covered in IR-oriented scholarship allows revisiting the ASC. In a nutshell, I maintain that '2011' indeed is a critical juncture for Middle East scholarship by providing a rich reservoir for conceptual claims that *inter alia* allow embedding IR perspectives on the region more firmly in broader social and historical trajectories, including theories of global modernity and world society. This ultimately

allows transcending the division between disciplines inherent to the original ASC and instead viewing 'generalizing social science and context-sensitive Middle East knowledge' (Bank and Busse in the introduction to this SI) as simultaneous and fundamentally entangled endeavours.¹

2. From the ASC to Halliday's *via media* formula

The ASC was a debate about the relationship between the 'general' disciplines, in particular political science, and Area Studies (cf. Tessler et al., 1999). One should note that the very notion of these two sides as separated entities is itself a convention with concrete political implications that has rightfully received criticism, in particular because it often goes hand in hand with claiming a hierarchy that puts the general disciplines and notions of 'universal' knowledge production on top, while framing Area knowledge as somewhat inferior (Teti, 2007: p. 118; Jung, 2014, p. 3). Thus, the very attempt of drawing a distinction between disciplines and Area Studies must be viewed with caution. As Jackson (2019, p. 49) notes with a view to South-East Asia, the tradition of dividing between disciplines and Area Studies carries heavy imperial roots deeply embedded in Western forms of knowledge production, which hinge on such 'spatialized regimes of knowledge'. One, thus, 'needs to be fully aware that the separation between Area Studies and the disciplines and the knowledge produced within their frameworks, too, is related to global epistemic power relations' as Claudia Derichs (2017, p. 8) aptly describes. The designation in that context of something as Area Studies is thus anything from unproblematic although at first sight it may 'sound innocent' (ibid.).

While the ultimate aim of this article is in line with overcoming exactly such hierarchized binaries, taking a fresh look at the ASC and its afterlife in Area Studies debates on the relationship between 'disciplines' and Area Studies is nevertheless useful. Not only because of the ASC's relevance for US Middle East scholarship but also, as I outline below, because the ASC triggered a critical, yet sympathetic engagement by European and Middle Eastern scholars working from various IR-perspectives on the Middle East. Further, the underlying hierarchies prevalent when distinguishing between 'disciplines' and Area Studies, albeit often in a subtle manner, continue to persist in debates on scholarship on the region until today. Thus, to be clear here: the starting point is the observation that the ASC took an alleged bifurcation between disciplines and Area Studies for granted. But at the same time, the ASC highlighted the relevance of both sides. The very purpose of this debate was, in the view of its key protagonists to 'demonstrate that social science theory and Area studies are not incompatible or even in competition with each other', thereby attempting to counter (from a positivist rather than 'critical' perspective) attempts to marginalize Area

Studies (Tessler et al., 1999: p. xv). In fact, research that 'draws upon and integrates the two analytical perspectives' (ibid.: p. xx) was applauded. However, a disciplinary hierarchy was implicitly involved in the ASC insofar as the argument was not so much to let 'general' disciplines and Area-Studies co-exist as equals, but to render the general disciplines more area-sensitive. This had the dire consequence though of somewhat relegating Area Studies to a reservoir of empirical knowledge production for the disciplines. Thereby, this attributed, indirectly, primary status to these 'general' disciplines. This is well reflected in the argument (ibid.: p. xvi) that 'political science and other disciplines will be best served by encouraging research that draws in a meaningful way on both scholarly perspectives', rather than mentioning both the 'general' disciplines and Area Studies as two equal hubs of research. It, therefore, seems fair to say that the ASC was, at least conceptually, leaning towards the 'general' disciplines, in particular political science (see also what Bank and Busse argue in the SI's introduction). While knowledge from Area Studies was highly valued, its theoretical potential was somewhat downplayed: this shows, for example, in the fact that the ASC largely neglected postcolonial perspectives. The ASC also failed to engage with theories of global modernity and world society that equally try to overcome Eurocentric perspectives. In the ASC, the higher ground was occupied by theory-guided research and methodologies anchored in a specific understanding of 'general' disciplines. In that sense, the ASC rested on a second pillar too, namely a Bourdieusian-style social struggle about status, power and hierarchies in academic fields (cf. Steinmetz, 2013). That is why Teti (2007, p. 122) rightfully situates the ASC within a distinct field of 'Anglophone Middle East Studies', the hub being the US, with its own notions and standards of what is considered proper academic knowledge construction. Such 'mainstream' (ibid.: p. 120) Middle East studies, can then be distinguished not only from 'classical' Area Studies. As Teti (ibid.: p. 130) explains, they can also be distinguished from other research traditions within the 'general' disciplines on the Middle East, such as continental European IR approaches, among them securitization theory, English School scholarship or Post-Colonialism.

This is not to suggest that continental European Middle East research in IR and beyond, or Post-Colonialism more generally, would not have their own open flanks. As Dietrich Jung (2014) has noted, disciplinary struggles are an integral part of a long European tradition of Oriental Studies. And not unlike the 1990s-ASC, they were shaped by an interrelationship between substance, the legitimization and de-legitimization of academic fields and political projects revolving around disciplinary hierarchies (ibid.: p. 3). Also, postcolonial scholarship is not immune from engaging in not so noble disciplinary politics and attempts to strive for hierarchical impositions and delegitimising other perspectives (Rojas, 2016). However, the implicit hierarchy between 'general' disciplines and Area Studies that figured so strongly in the ASC is somewhat

less relevant in Middle East scholarship in Europe. This probably is due to the heterogeneous organization of academic fields in Europe shaped by often nationally defined historical trajectories and clashing erstwhile imperial ambitions, but also due to the significance of 'classical', non-positivist ways of knowledge production rooted *inter alia* in hermeneutics (and linguistic competence). The same is true for postcolonial approaches, which anyhow are a wholesale critique of this very distinction between 'general' (read: Western) concepts and (often Western-centred) Area Studies, including the latter's Orientalist and Eurocentric baggage.

In the contemporary European context, the discussion about the relationship between 'general' disciplines and Area Studies has then resurfaced in the early 2000s amongst scholars working at the interstices of IR theory and Middle East scholarship. Paradigmatic here is Morten Valbjørn's (2004a) encouragement for a cross-fertilization of the 'academic Mesopotamia' (i.e. Middle East scholarship) by irrigating research on the region with inputs from two 'rivers': the 'streams' of IR and social sciences generally speaking, on the one hand, and Area Studies, on the other. It is precisely this mix, Valbjørn explains (Valbjørn, 2004b), that protects Area Studies from being 'culturally blinded', i.e. over-emphasizing and romanticizing the uniqueness of local dynamics. But it also protects the 'general' disciplines from being 'culture blind' by turning general concepts into abstract, sterile, and ultimately a-historical models, a critique of mainstream IR theorizing forcefully made by Buzan and Little (2001).

It is at these interstices of IR and Area Studies where Halliday comes in. He has offered a related perspective that directly speaks to such a debate's core concerns and adds to Valbjørn's aforementioned perspective the equally important notions of 'modernity' and 'history'. Thus, Halliday viewed the relationship between 'general' disciplines and Area Studies not only as a matter of different research angles. In fact, he (Halliday, 1996, p. 58) explains, the Middle East, as other postcolonial regions, is characterized by a 'universal' exposition to modern structures, ideologies, and power formations. At the same time, however, the specific timing and networks of relations in the Middle East engender region-specific historical particularities. The core here is that only by taking this historical perspective on the formation of the 'modern Middle East' (ibid.: p. 67) into focus, can one arrive at an understanding of the region that is taking both universal and particular factors into account. Thus,

'the particularity of the Middle East is [...] to be seen in the manner in which its contemporary social formations have emerged: these particularities are however to be grasped in terms of analytic categories that are universal, and that may be all the more revealing precisely because they are of general and comparative application' (ibid.: p. 58).

In other words, what Halliday suggests is transcending the distinction between 'general' disciplines and Area Studies, instead rendering the interplay between 'analytic universalism' and 'historic particularism' central (ibid.). Halliday has shown the merits of this approach in his extensive oeuvre by situating the placement of the Middle East in the international system in a perspective that links core features of global modern order, such as state-building, bureaucratization, nationalism and trade in the Middle East, with historically shaped international power relations. Regional particularities matter, but are 'part of, rather than distinct from, the broader political issues and debates of modern times' (ibid.: p. 74). Halliday (2005, p. 39) also argues that the widespread practice and comparatively high legitimacy attributed in the Middle East to external, often violent interventions by global, but equally by regional actors into other states' domestic affairs is a prime example of such 'historic particularities' (cf. Gonzalez-Pelaez, 2009, p. 115).

At first sight, there is little to object to Halliday's formula. For what is to be said against maintaining a properly equipped arsenal of analytic concepts when studying the Middle East, while at the same time possessing solid historical knowledge about the specificities in the formation of the region's structures, in particular the colonial contexts that accompanied the formation of modern Middle Eastern states and societies? Yet, in the following two sections I wish to show that key IR-debates on the Middle East that have gained prominence during the last decades, and in particular since the Arab uprisings, suggest that revisiting and partially transcending Halliday's insightful formula is warranted. As I will outline, key contributions on the Arab uprisings since 2011 point to an emerging new paradigm that could infuse a rejuvenated Area Studies debate. This paradigm is based on what I term 'analytic polycentrism' and 'historic entanglements'. As I will outline, this allows sticking to Halliday's warranted advice to address the embedding of the Middle East in global, modern contexts, while getting rid of some of the problems related to notions of allegedly 'universal' knowledge production that undergirds Halliday's formula.

3. Analytic polycentrism and historic entanglements in debates on the Arab uprisings

What is the relevance of 'analytic polycentrism' and 'historic entanglements' for a rejuvenated Area Studies debate? As I discuss in this section these concepts allow studying the Middle East as an integral part of global modernity, while avoiding the problematic bifurcation between disciplines and Area Studies. More specifically, by drawing from theories of global modernity and world society, I wish to show in this and the following section that by embedding IR-oriented research on the region in such historical-sociological perspectives, Middle East scholarship becomes a site of

knowledge production for both the region and the diverse project of global IR (Acharya, 2014).

Studies on the Arab uprisings of 2011 turn out to be an important conceptual reservoir for a rejuvenated Area Studies debate. That is why, as elaborated in the following, it is helpful to, firstly, focus on key literature on the Arab uprisings that studies the ambivalence of political rule and the ubiquitous and polycentric occurrence of contestations in the shadow of entrenched hierarchies. And, secondly, to focus on how local events in the Middle East in the context of the Arab uprisings, but also the authoritarian responses and international interventions to them ever since, are embedded in global historical horizons. These horizons, as I will outline, are shaped by the shared, but uneven integration of world regions into the modern global order since at least the late 18th century, i.e. colonial, imperial and postcolonial imprints. This echoes Fawcett's (2020, p. 177) claim that the Arab uprisings have been 'manifestly and profoundly shaped by international forces, with which IR theory has yet to fully engage'. In that sense, engaging with the Arab uprisings as a critical juncture for Middle East scholarship through the perspective of theories of global modernity and world society contributes to the wider project of 'decolonising IR' (ibid.) and IR's entrenched ways of 'tidy or parsimonious theorising' (ibid.: p. 179), i.e. the kind of IR-knowledge production that is rightfully criticized in various branches of global IR. While thus being situated in IR, the conceptual apparatus from which this article draws in the following is not using mainstream IR-jargon in its liberal, social constructivist or realist outlooks. However, given the increasing inroads which historical and sociological theories, including theories of global modernity and world society, have made into IR (theory) the conceptual apparatus resorted to in the following cannot be considered any longer alien to IR either. It reflects the integration of IR theorizing in the wider universe of social science theorizing, in particular historical-sociological approaches.

Let me first turn to debates about power in the Middle East since 2011 and how this relates to what I label 'analytic polycentrism'. The starting point here is the observation that Middle East scholarship in the social sciences, including IR, prior to 2011 – but also in the context of policy-making, such as in the EU's neighbourhood policy towards Arab countries (cf. Teti, 2015) – often got tangled up in a deceiving belief in the alleged stability of authoritarian states throughout the region. As Hom (2016, p. 170) explains, 'the "Arab Spring" produced surprise and uncertainty', in particular with a view to such long-held assumptions about stability the region, which were nourished not least by key protagonists of the ASC (see self-critically Gause, 2011). That is why the Arab uprisings are not merely an interesting empirical constellation but can be used 'to critically revise extant theories' in IR and beyond (Hom, 2016, p. 178). This is today a more pressing need than ever, since the resurgence of authoritarianism from Egypt to Saudi Arabia is often interpreted as a sign of

a remarkable, region-specific resilience of autocratic regimes rather than an expression of the latter's very weakness. As a result, alternatives to authoritarianism continue to be regularly painted in the colours of worst-case scenarios of regional 'turmoil'. An example here is Falk (2016: pp. 2331–2332), who argues that the region faces a painful, but clear choice between counter-revolution and 'chaos and internal strife', the latter being visible in Iraq, Lebanon, Syria and Yemen but potentially threatening all states in the region, and by implication, stability and security in the wider world (cf. Aras & Yorulmazlar, 2016, p. 2260). The latest twist of the authoritarian-resilience-myth appears to be the COVID-19 pandemic and the renewed expectation that 'the new coronavirus may be deepening dictatorships in parts of the Middle East already tightly controlled by authoritarian regimes' (Brown et al., 2020). This is not to dispute that authoritarianism has a powerful presence in many states in the region and that naive optimism about democratic and peaceful change that shaped some early perceptions of the uprisings in Tunisia, Egypt and elsewhere lacked analytical depth too. But it is a stark reminder that as Brownlee and Ghiabi (2016, p. 300) warn, 'the roots of this cultural and political diagnosis are also likely to be the source of further misconception during this long and conflictual moment of struggle in the Arab world'. A much more nuanced picture is painted by Del Sarto et al. (2019, p. 44), who concede from an IR perspective that regime resilience continues to be a factor but equally highlight that 'authoritarian resilience and upgrading stand in clear contrast to the aspirations of many people in the Middle East', which structurally weakens the 'already contested legitimacy of many rulers' in the region.

Politics in the Middle East are thus characterized by what could be termed complex uncertainty. This observation points to a stream of literature on the Arab uprisings that challenges linear beliefs in either continuity or change, instead highlighting the general unpredictability of how power relations, even if extremely hierarchical as in many authoritarian states in the region and the international order as a whole, ultimately play out. In other words, by echoing general claims made in social theories of power (cf. Berenskoetter & Williams, 2007), the contingency of power as a fundamentally relational category is emphasized, thereby rejecting that power is something quasi-material possessed by entrenched elites. As Buckner and Khatib (2014, p. 375) explain, a 'top-driven framework of image production' about social power, as it undergirds the idea of authoritarian resilience, tends to 'serve the political aims of those in power' (ibid.: p. 376) but is of little use in explaining the complexities of regional politics. The unexpected ways, in which the Arab uprisings have unfolded, even if hopes for reforms did not necessarily materialize, point to these complexities. It is, therefore, consequential that this led to calls for a 'decentring research agenda' (Kamel & Huber, 2015, p. 274) on the Middle East, which takes a greater interest in contestations to established

forms of power in realms of 'exclusion, marginalization and peripheralization' (ibid.: p. 279) – from neglected Cairo neighbourhoods to ordinary individuals whose actions trigger larger events, such as the self-immolation of Muhammad Bouazizi in Sidi Bouzid in Tunisia to the killing of Hamza Al-Khatib in Syria. As Buckner and Khatib (2014, p. 377) then conclude, the Arab uprisings are a prime example of how 'everyday citizens [are] able to create and spread images of [...] agency and power'.

Highlighting the significance of 'oppositional discourse' (Al-Zo'by & Başkan, 2015, p. 407), whether stemming from liberal or religious actors, is a widespread conclusion in research on the post-2011 Middle East. The fact that such voices are often underrated has to do not merely with restricted or even dangerous field access, although this certainly also plays a role. Thus, underestimating polycentric power often has to do with clinging to an 'orientalist notion of the inability of Arabs to govern themselves' (Al-Maghlouth et al., 2015, p. 430). In that sense, the Arab uprisings, even though being a largely unfulfilled revolution, figure as a critical juncture for Middle East scholarship by providing 'evidence for political agency and self-determination' that defies beliefs in an inherent 'otherness of the Orient' (ibid.). More specifically, they exhibit 'shared attributes of global uprisings' that translate into 'a new type of reflexive individualism in the Arab revolutions' (Bamyeh & Hanafi, 2015, p. 345) that becomes politically more important. As Malmvig (2014, p. 145) concludes, that is why we need 'to broaden our understanding of power' in IR and Area Studies if we want to make sense of Middle East politics since (and before) the Arab uprisings. However, rather than romanticizing opposition to authoritarianism, this focus on the dispersion of power should be seen, from a conceptual angle, as an opportunity to bring back politics, as it were, into the study of the Middle East: 'more attention should have been given to actors and processes that were considered irrelevant or marginal' (Rivetti, 2015, p. 3) in many debates on the region. The academic study of the Arab uprisings is thus not primarily about the opportunities or risks associated with change. First and foremost is it a debate about fruitful analytical pathways that allow to 'perceive the rights claims made by the protestors as parts of a concrete political struggle' (Borg, 2016, p. 213), both against local security apparatuses as well as against global perceptions of Middle East otherness and Western, Russian, Iranian and Chinese support for authoritarian rulers and political forces. In short, it is a debate about the 'collective actions of noncollective actors [which] embody shared practices of large numbers of ordinary people whose fragmented but similar activities trigger much social change, even though these practises are rarely guided by an ideology or recognizable leadership and organizations' as Bayat (2013, p. 14) has pointedly stated.

This is a perspective which Brownlee and Ghiabi (2016, p. 301) have named a 'scholarship of silence' – scholarship that listens to 'unheard voices, local

ecologies of protest and contestation' (ibid.).² Following this reasoning, Samer Abboud et al. (2018) have noted under the banner of the Beirut School of Critical Security Studies, that acknowledging the fundamental polycentrism of power in the Middle East should not only inspire the critique of the authoritarian-resilience-myth in IR. It should also facilitate the study of the interplay between global and regional hierarchies, hegemonic security paradigms and how Orientalist assumptions in popular culture, and policy-making, often prevent scholars as much as practitioners from recognizing the pervasiveness of these hierarchies (cf. Mattern & Zarakol, 2016). That is why studying polycentric power ultimately means overcoming 'hegemonic interpretations of what is "policy relevant" for the Middle East' (Abboud et al., 2018, p. 274), not least a critique of the constant emphasis on 'security' (cf. Bilgin, 2004). A core purpose of Middle East research in IR and beyond then is to 'challenge and provide an alternative to [such] temporal geographies that serve to diminish or peripheralize the experiences of those who are most affected by colonial and imperial legacies and their contemporary manifestations' (Abboud et al., 2018, p. 279).

This argument points to a second conceptual insight from this literature, namely the entanglements between local events unfolding in the region since 2011, and the way in which these events are embedded in global, historically shaped and often postcolonial horizons (cf. Mirsepassi et al., 2003). Two arguments stand out here. Firstly, the uprisings highlighted the importance of transnational and global linkages, both with a view to networks between actors and the spread of ideas. Such analyses, which transcend state-centric and security-obsessed perspectives, consequently form the core of a new wave of IR studies interested in the Middle East. As Kamel and Huber (2015, p. 275) explain, 'mobilizing international links has been a rather successful strategy' in different protest settings. The same can nevertheless also be said about how such links are mobilized by elites, e.g., with a view to how 'global imperatives of policing and asymmetrical forums of transparency' (Abboud et al., 2018, p. 286; cf. Aras & Falk, 2015) are used as a resource in the context of authoritarian counter-strategies (cf. Josua & Edel in this SI). Secondly, then, these links have played out differently in different contexts (cf. Anderson, 2011; Abboud et al., 2018, p. 273) and these divergences need to be seen in relation to the specific, historically shaped state-society relations in different Arab countries and their respective embedding in a hierarchical international order. Taking these historical formations into account allows to arrive at more nuanced understandings of the 'different mixes of continuity and change under the impact of the Arab uprisings' as Hinnebusch (2014, p. 12) reminds us. Thus, the 'complexity of the Arab uprisings' not only needs to connect 'the political to the social and economic' but, centrally, has to be enriched by 'historical depths' (Al-Maghlouth et al., 2015, p. 433).

A shared theme thus emerges here in the literature which is compatible to Halliday's argument: namely that a historical perspective, properly understood, has to put local-global encounters, including (post-)colonial ones, centre-piece: from the study of how protest movements interact across borders, to Western intrusion and power politics, to the way 'postcolonial anxiety' shapes narratives on security, change and foreign policy by elites and ordinary people throughout the region (cf. O'Riley, 2007). As Abboud et al. (2018, pp. 282–283) summarize, this should culminate in 'a genealogy of how the region gets incorporated (or not) into global frameworks, institutions and discourses of global security as they have evolved from the colonial past to the colonial [*sic!*] present'. However, as warranted as this focus on hierarchies is, a historical and sociological perspective also allow delving deeper into the transformative features of global modernity and world society, within which such hierarchies play out. In other words, while postcolonial encounters are crucial in order to understand the way the Middle East is integrated into global contexts, there are other elements of global modernity and modern world society that warrant attention too and that often escape postcolonial scholarship. To these I turn in the subsequent section.

4. The Middle East, polycentrism and entanglements through the prism of global modernity and world society

A rejuvenated Aras Studies debate stems to gain from a stronger engagement with theories of global modernity and world society. Thus, based on the identification in the previous section of 'analytic polycentrism' and 'historic entanglements' as cornerstones of a rejuvenated conceptual debate on the region, I outline in this section one possible trail to stroll in order to render these observations of polycentrism and entanglements fruitful for Middle East scholarship in IR and beyond. I suggest doing so by bringing these two cornerstones into dialogue with theories of global modernity and world society, research angles that have, as mentioned above, gained growing prominence in global IR but have so far remained rather little explored with a view to IR scholarship on the Middle East (for exceptions see Busse, 2018; Jung, 2017; Stetter, 2008). This is not the place here to discuss the intricacies of what is in fact quite a universe of different theories of global modernity and world society, including theories of pluralist/connected modernities by Shmuel Eisenstadt or Gurminder Bhambra, Pierre Bourdieu's focus on social fields, different notions of world society by Niklas Luhmann and John Meyer, or Michel Foucault's concept of governmentality (cf. Stetter, 2013; Bhambra, 2014; Bourdieu, 1990; Eisenstadt, 2000; Foucault, 1982; Luhmann, 2012; Meyer, 2000). Suffice to highlight here that many of these theories are, despite all differences, jointly anchored in a historical-sociological understanding of globalization and are all interested in the complex social

dynamics unleashed by the forces of modernity on individuals and societies around the globe. This includes studies on the way in which the 'international system' as a distinct social sphere emerged and evolved in global modernity (see Albert, 2016; Stetter, 2019). As Hurrell (2020, p. 194) puts it, 'we need to develop a far more social view of the system' of international politics when studying core features of international politics, such as geopolitics or nationalism.

Notwithstanding considerable differences in perspectives, the aforementioned theories contribute to this objective by allowing viewing the sphere of the 'international' as part of global modernity and world society. They share the basic understanding that modernity is a globally encompassing, yet heterogeneous social condition that invokes manifold contradictions. Modernity is a process that can be understood as the underlying matrix for most societal contestations and social struggles across social fields and systems. A caveat is in order though. Thus, although these aforementioned theories have been studied in relation to the Global South, including the Middle East, it needs to be noted that most of these theories were developed in Western contexts with mainly European (or North American) history in mind, and embedded in Western ways of knowledge production. There is thus room for improvement in further developing these theories by rendering non-Western experiences with modernity and global encounters ever more central to them. In other words: de-centring not only IR theory, but also theories of global modernity and world society. This entanglement between theories (of global modernity and world society) and knowledge production is another stark reminder that there is no hierarchy between these theories and Middle East scholarship – the latter should inspire and encourage the former to evolve, as much as the other way around.

The goal here is therefore not to sketch out a comprehensive framework for how theories of global modernity and world society could be of use for studying IR (cf. Albert, 2016) or Middle East politics, (Stetter, 2008, 2012). The goal rather is to show how theories of global modernity and world society can be made fruitful to Middle East scholarship by bringing insights from these theories into contact with the two core themes of 'analytic polycentrism' on power relations and 'historic entanglements' embedded in local-global interplays outlined in the previous section. I will suggest that as far as analytic polycentrism is concerned, the concepts of differentiation and subjectivity provide a helpful and novel point of reference for putting the observation of an unpredictability of power relations throughout the Middle East before and after the Arab uprisings firmly into sociological perspective. With a view to historic entanglements, I will highlight that the concepts of emergence and evolution provide a useful and equally novel matrix for studying the diverse trajectories of how historically shaped interlaces between the local and the

global affect socio-political structures in the region prior to and following 2011.

Let me first turn to a sociological understanding of the polycentrism of power in the Middle East and how this relates to the concepts of differentiation and modern subjectivities prominent in theories of global modernity and world society. The essence, and interrelationship, between both concepts is well captured by Jung (2017, p. 35), who identifies differentiation and the rise of subjectivities as core features of modern world society and who warns against excluding the Middle East 'from one of the master narratives of modernity', namely differentiation. Rather than viewing modernity as something Westerners had brought by violent and non-violent means to the Middle East and other parts of the Global South, an understanding of modernity as a 'de-localized' transformative process highlights the fact that modernity is a disruptive force throughout the world. Forces of modernity challenge societies everywhere, including the West, by triggering an 'increasing differentiation of social realms [in] all spheres of life' (ibid.) as well as by igniting fundamental social change that led to the formation of modern subjectivities as a result of which 'individuals seem to become simultaneously more autonomous and more dependent' (ibid.; cf. Jung & Stetter, 2019). As highlighted by *inter alia* historically oriented research in IR, but also by scholarship in Global History, this process took full steam during the 19th century, and this not only due to Western imperial and colonial impositions, as e.g., endogenous dynamics of social transformation in the Ottoman Empire during the 19th century attest. Viewing modernity as a seismic social transformation allows capturing the ways through which Middle Eastern leaders and people in the 19th century tried to make sense of this fundamental transformation, as did their European contemporaries. Historically, such adaptations to what can be understood as political responses to an unfolding process of functional differentiation led to an increasing complexity of different social spheres, or systems (cf. Luhmann, 2012). The effects of functional differentiation range from the reform of governance structures in the Ottoman Empire during the 19th century (Duzgun, 2017), mirrored by similar reforms of the bureaucracy, to the tax systems as well as the military and education in the semi-autonomous province of Egypt under Mohamed Ali and his successors, to the rise of what became over time mass ideologies in the Middle East such as nationalism, and the formation of mass political parties, not least the recourse to Islam as a potent modern political force (Jung, 2011). It also includes the way scientific racism as a decidedly modern idea has become part of making sense of social order in the Middle East, e.g., in the way Ottoman elites started to frame non-Turkish subjects, in particular Arabs, as racially inferior – what Ussama Makdisi (2002) has referred to as 'Ottoman Orientalism'.

Differentiation, though, not only refers to the emergence of distinct social spheres, each with its own field-specific struggles, and the broader social and political repercussions this has (cf. Albert et al., 2013). It also signifies an increasing differentiation *within* social spheres, such as politics. Theories of global modernity and world society highlight here in particular what can be described as an increasing internal complexity of politics. This increasing complexity of politics shares many similarities with what has been described in the previous section as a polycentrism of power but relates this to a broader theory of political contestations in global modernity (cf. Stetter, 2008, pp. 69–104). Central here is the observation that the character of political rule changes in modern world society: the emergence of politics as a differentiated social sphere undermined the legitimacy of stratified forms of relationship as the hegemonic form of distributing power in society. While politics, by definition, is about the social production, maintenance, defence and subversion of hierarchies, politics in global modernity is defined by novel ways of social struggles. Central here is, firstly, the ‘demystification of power’ (ibid.: 77), i.e. power as a form of capital becomes structurally disentangled from specific social classes or other collective groups and a trophy that, potentially, each social group can aspire to (cf. Bourdieu, 1990; Luhmann, 2012). This does not mean that specific groups would not temporarily strive successfully for political authority and hegemony, such as Mubarak in Egypt under the state of emergency that lasted from 1981 until 2011, or various ethno-national or religious groups throughout the region that occupy, at the expense of other groups, key posts in government, the security apparatus, business and society as a whole. It means, however, that while the likelihood of contestations can be severely constrained through states of emergency, politics of *Angst* spread by the secret police and various technologies of surveillance, such fortifications of the state – or likewise of regional alliances and of the international order at large – do not trump the very form in which modern political spheres are organized: as social fields in which struggles over status and capital are ubiquitous and which cannot be completely silenced.

Secondly, then, politics in modern world society gradually transform into mass politics, a process well captured by Foucault’s notion of governmentality and also addressed in Meyer’s theory of a world polity/society. This relates specifically to what is called in these theoretical traditions the emergence of modern subjectivities/actorhood as global scripts that have tremendous social power (Jung & Stetter, 2019; cf. Foucault, 1982; Meyer & Jepperson, 2000). On the one hand, modern politics addresses, and thereby constructs, individuals as subjects that have to be governed but modern order across the globe also relies on subjects that ‘contribute to social order through various technologies of the Self’ (Stetter, 2019, p. 32), i.e. by organizing oneself as a ‘sovereign actor having intrinsic agency’ (Thomas, 2019, p. 169) within the

political sphere. This is also an important insight for the Middle East (cf. Busse, 2018) insofar as it helps understanding better which role individuals play both in the maintenance of and opposition to authoritarian rule from the colonial era, to early postcolonial years of popular authoritarianism (Hinnebusch, 2006) to the collective power ordinary citizens unleashed in uprisings since 2011. Scholarship on the Middle East in IR and beyond would have been well advised to take greater note of this impact of differentiation and of modern subjectivities as key features of modern social order prior to 2011. The surprise about the uprisings would certainly have been smaller.

Putting the second cornerstone, namely historically shaped local/global entanglements, into a theoretical perspective inspired by theories of global modernity and world society brings into focus the notions of emergence and evolution. This anchors the sociological perspective on the polycentrism of power in what Global Historians like Jürgen Osterhammel (2014) refer to as a Western-dominated transformation of the world, a social process that took full force during the 'long 19th century', not least throughout the Middle East. This perspective thus bears resemblance to postcolonial scholarship because it views globalization as a social process shaped by hierarchies formed in the context of colonial and postcolonial encounters (emergence) and the way this shapes subsequent events (evolution). The key point here is, thus, not only to focus on how local actors and events in the context of the Arab uprisings are part of globalized actor networks, flows of ideas and media reporting. While the observation that local events in the Middle East are embedded in global social horizons is important, what matters as well is to address the social and political arenas within which these local/global entanglements play out. And this brings in the notion of a historically generated context in which, over time, various hierarchies shaped by colonial and postcolonial imprints at national, regional and international scales emerged and evolved. Cases in point here are the (post-) colonial trajectories underpinning the centrality of regime stability in many Middle Eastern states from their independence until today; and that contribute to the lack of solid regional security architectures in the region too.

This historical perspective is important because in the day-to-day analysis of Middle East politics, e.g., when addressing the Arab uprisings of 2011, this broader context can easily be dismissed, as it often happens in both academic discourse and policy-making. There are many angles to such a historically sensitive perspective, and the aforementioned notion of 'historic particularism' by Halliday is also firmly anchored in such a way of thinking. One important facet which theories of global modernity and world society can add is the observation that the international system is to a large degree a differentiated political sphere, shaped by the internal complexities of modern politics highlighted above, that emerged in the course of the 19th century and although it evolved since then, carries with it imperial and

colonial imprints that are long gone but still inform hierarchies and manifold practices in this differentiated system (cf. Buzan & Lawson, 2013). As far as a rejuvenated Area Studies debate is concerned, such a focus on how historic entanglements shape the international system can inform scholarship on the Middle East on several levels. Thus, while postcolonial studies tend to focus on the indisputable constraining effects of such hierarchies on local actors, a world society perspective – informed by a polycentric understanding of power – lays greater emphasis on also discussing the enabling dimension of hierarchies. For example, theories of world society draw from Foucault's notion of technologies of the Self, a concept somewhat underestimated in 'critical' scholarship that aims to shed light on subaltern voices, but remains sceptical about their transformative potential in the light of allegedly entrenched postcolonial hierarchies. I do not object to this notion of entrenched hierarchies that privilege Western states and other great powers, as well as ruling elites in the Middle East. But I do suggest that a world society perspective offers a more sociological and historically grounded approach, by providing a theoretical umbrella that helps understanding why scandalizing international hierarchies and their Orientalist frames has been a powerful tool through which actors in the Middle East claimed agency and challenged the self-proclaimed standards of civilizations (cf. Buzan, 2014) upheld by Western powers and for a long time enshrined in international law. In the same vein, the Arab uprisings of 2011 can, and should be, studied as a scandalization of the specific form postcolonial statehood took in many countries of the Middle East, in particular the extremely uneven forms of political and economic inclusion of few and exclusion of many that prospered in these contexts, and that is sustained by international hierarchies and alliances until today.

Finally, looking at the legacies of the Arab uprisings from a historically sensitive, evolution theory perspective – a core element of world society theories in the tradition of Luhmann (2012) – allows detecting the conceptual fallacies of the updated authoritarian resilience theory, which I have already pointed to in [section 3](#), and to which ironically both positivist research and postcolonial scholarship often tend to fall victim to. Thus, social evolution highlights the sequencing, in societal communication, of variations, selections and re-stabilizations (cf. Luhmann, 2012). Variations can be understood as all possible rejections of a given status quo, e.g., the protests against Assad, Ben Ali, Mubarak and Saleh in 2011. Evolution theory highlights that variations always make a difference and lead to what is called positive or negative selection. This sequence of variation, selection and re-stabilization can be applied to the study of the Arab uprisings on various levels (cf. Stetter, 2015). For the purpose of the discussion on historical entanglements here, it suffices to highlight that positive selections refer to social settings in which contestations are taken up in subsequent political and social practice, leading to change, as in the complex transformation process in Tunisia. In contrast,

negative selection implies that contestations encounter more or less forceful counter-contestations, as in Egypt after the ouster of short-term president Mohamed Morsi in 2013 or in the violent response by the Assad government and its Iranian and Russian allies to the uprisings in Syria. Both types of selection shape political life in the post-2011 Middle East. As a result, the notion of '2011' has turned into what can be called a benchmark date, a trajectory that can no longer be ignored in societal communication. While neither positive nor negative selections can claim hegemony in the region – and are, obviously, normatively speaking quite different outcomes – they both leave a shared and enduring imprint on regional politics. That is the memory of the Arab uprisings as a sequence of events that cannot be forgotten. '2011' manifests itself as a 'permanent revolution' (Dabashi, 2012, p. 253). In that sense the Arab uprisings have fundamentally altered the parameters within which regional politics play out ever since – and add another layer to the historic entanglements Middle East scholarship should be constantly aware of, rather than downplaying its significance as for example, evident in the widespread reference, also in IR, to an 'Arab winter' (King, 2020).

5. Concluding remarks

In this article I have suggested that theories of global modernity and world society offer one amongst several entry points for translating notions of polycentric power and historic entanglements, that figure strongly in key literature on the post-2011 Middle East, into a conceptual umbrella that can inform a rejuvenated Area Studies debate and also contribute to broader debates of moving theorizing about the global condition and knowledge production in (global) IR and beyond forward. I have attempted to show that rather than claiming to transcend other contributions, such a rejuvenated debate should see itself in a long tradition of coming to terms with the simultaneity of universalizing and particularizing dynamics so central to modern world society. The arguments presented here do therefore not present these theories as a radical alternative to other approaches on the Middle East in IR and beyond that are interested in similar phenomena, such as postcolonial approaches or research inspired by the English School or securitization theory. This would only lead to the kind of disciplinary politics, and claiming of dubious hierarchies, which I have criticized in the beginning of this article. Rather, the focus on differentiation and subjectivity as well as emergence and evolution suggested here as *one* way of theorizing polycentric power and historic entanglements should be seen as adding viewpoints generally compatible with other approaches in scholarship on the Middle East in IR and beyond subscribing to historical-sociological reasoning – but then certainly making specific selections that

emanate from introducing concepts not stored in the intellectual arsenal of these other approaches. The merits of this endeavour can, and should, then not only be measured on the basis of how attractive (or not) these concepts are for the theoretical mind. But first and foremost by how much theories of global modernity and world society help in generating novel ways of knowledge production that shed light on the Middle East, before and after 2011, as a constitutive part of the modern world – and in that way follow up on the hope expressed in the SI's introductory article that a 'renewed engagement with the ASC can also help putting [the Middle East] into a global context'.

Notes

1. This article does not focus on the SI's third cross-cutting issue, namely implications of '2011' with a view to changing field access and research ethics. Apart from the repression- or war-related restrictions outlined in the SI's introductory article by Bank and Busse, there are also enabling factors triggered by '2011'. Thus, the widening scope of research questions IR scholars can legitimately ask with a view to the region both due to the lessons of '2011' and the more general turn towards 'global IR' (e.g., the role of individuals, focus on marginalized groups, non-Western perspectives, etc.) opens up possibilities for new research areas – and methodologies – hitherto only sparsely present in IR. In that sense, the afterlife of '2011' is marked by both restrictive and enabling factors as far as field access is concerned.
2. The challenges one encounters when claiming to 'represent' the marginalized from a privileged scholarly position are widely discussed in critical takes on 'critical' scholarship but are not central to the arguments in this article (see only Spivak, 1999).

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