



The Global South by the Global South? Latin American IR writes the Middle East

O Sul Global pelo Sul Global? As RI latino-americanas escrevem sobre o Oriente Médio

¿El Sur Global por el Sur Global? Las RI latinoamericanas escriben sobre Oriente Medio

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ABSTRACT

This study assumes that the Social Sciences fulfill a normative function with subjective effects. It examines the knowledge (re)produced in regions of the Global South about other regions within the same category, focusing on how Latin American International Relations scholarship constructs knowledge about the Middle East. To this end, it analyzes articles on the Middle East by Latin American authors published in SciELO-indexed journals (2011–2019). The findings suggest that these analyses often replicate Western IR's ontological, epistemological, and theoretical assumptions while incorporating elements of peripheral Orientalism. In doing so, the study highlights the conditions and effects of subjectification in the (re)production of this knowledge.

Keywords: South-South relations; Latin American IR; Middle East; Peripheral Orientalism

RESUMO

Este estudo parte do pressuposto de que as Ciências Sociais desempenham uma função normativa com efeitos subjetivos. Ele examina o conhecimento (re)produzido em regiões do Sul Global sobre outras regiões dentro da mesma categoria, com foco em como a produção acadêmica latino-americana em Relações Internacionais constrói conhecimento sobre o Oriente Médio. Para isso, analisa artigos sobre o Oriente Médio escritos por autores latino-americanos e publicados em periódicos indexados na SciELO (2011–2019). Os resultados sugerem que essas análises frequentemente replicam os pressupostos ontológicos, epistemológicos e teóricos das Relações Internacionais ocidentais, ao mesmo tempo em que incorporam elementos do Orientalismo periférico. Ao fazê-lo, o estudo destaca as condições e os efeitos da subjetivação na (re)produção desse conhecimento.

Palavras-chave: relações Sul-Sul; RI latino-americanas; Oriente Médio; Orientalismo periférico

RESUMEN

Este estudio parte del supuesto de que las Ciencias Sociales desempeñan una función normativa con efectos subjetivos. Examina el conocimiento (re)producido en regiones del Sur Global sobre otras regiones dentro de la misma categoría, centrándose en cómo

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la producción académica latinoamericana en Relaciones Internacionales construye conocimiento sobre Oriente Medio. Para ello, analiza artículos sobre Oriente Medio escritos por autores latinoamericanos y publicados en revistas indexadas en SciELO (2011–2019). Los resultados sugieren que estos análisis suelen replicar los supuestos ontológicos, epistemológicos y teóricos de las Relaciones Internacionales occidentales, al tiempo que incorporan elementos del Orientalismo periférico. Al hacerlo, el estudio destaca las condiciones y efectos de la subjetivación en la (re)producción de este conocimiento.

Palabras clave: relaciones Sur-Sur; RI latinoamericanas; Oriente Medio; Orientalismo periférico

INTRODUCTION

Latin America and the Middle East are European inventions. The shaping of territorialities and the essentialization and homogenization of cultures within them, have historically worked as ways of constituting identity and otherness. Social sciences have played a crucial role in it. This article is particularly interested in International Relations (IR) whose normative character (Walker, 1991) establishes binary differentiations among regions, othering those not matching with the Western ideal.

This text focuses on knowledge (re)produced by Global South regions to reflect on how they also participate in relations of power and ways of subject constitution. Specifically, it inquires into Latin American IR knowledge about the Middle East. With that objective, it presents a content analysis (Bernete, 2013) of papers published in indexed Latin American IR journals between 2011 (peak year of the Arab uprisings) and 2019 (pre-COVID pandemic).

The text is divided into four sections. The first focuses on Latin American IR's ontological, epistemological, and theoretical assumptions and main research agendas. The second tackles how it has historically dealt with the Middle East. The third section concentrates on methodological issues, and the fourth, presents a content analysis of the articles referring to the

Middle East region published in indexed Latin American IR journals. Finally, the paper provides some conclusions.

1 LATIN AMERICAN IR AND ITS ASSUMPTIONS

Latin American IR has mainly contributed to the sub-fields of International Political Economy and Foreign Policy having a particular imprint (Miguez; Deciancio, 2016). However, in sharing the epistemological and ontological assumptions of mainstream perspectives such as Realism, Liberalism, and “Via Media Constructivism”, or diverse combinations of them (Medeiros; Barnabé, 2016; TRIP, 2017; Tickner, 2003), in general, it has confirmed “the continued status of IR as an ‘American Social Science’” (Tickner; Waever, 2009, p. 3).

Concerning topics and research agendas, according to the 2017 TRIP survey², Latin American IR is mainly devoted to International Security, International Political Economy, Foreign Policy, International Relations of a parti-

² Teaching, Research & International Policy (TRIP) is a research lab at William & Mary's Global Research Institute in Virginia, United States. Every three years, the lab surveys researchers and professors in different regions, including Latin America, on teaching and research in International Relations. This is an input that provides valuable information as it is methodologically rigorous and is carried out periodically. The results are available at <https://trip.wm.edu/>

cular region or country, and IR Theory. For its part, the results of our analysis of leading IR journals of the region published between 2011 and 2019 shows that 62.5% of the issues with which the published papers deal correspond to: Foreign Policy (29.5%), International Security (16.6%), International Political Economy (8.3%), and Regional Integration/Regionalism (8.1%). Within these sub-fields, when it does not deal with Latin America, the research is focused on Europe and the United States. This way, Latin American IR tends to reproduce the discipline's Western-centrism.

In this context, how does Latin American IR read/write the Middle East? To answer this question, it is first necessary to look into how has knowledge about the Middle East been historically built in our region.

2 LATIN AMERICAN IR AND THE MIDDLE EAST: PERIPHERAL ORIENTALISM AT WORK

Relations between what would later become Latin America and the Middle East have been mediated by the West from the start: European orientalist thinking was present in Latin America during the colonial period and also was an important source of reference for the building of the nascent nations (Bergel, 2015). Because of the dependence on European sources, the lack of originality, and the marginal position in the overall cultural production, Hernán Taboada labelled this orientalism as peripheral (Taboada, 1998).

Despite a noticeable general increase in interest in the Middle East from Latin America, its study from IR continues to be non-significant. Issues related to Asia and Africa stay outside the

core of Latin American IR's interest and occupy a limited space. According to the 2017 TRIP survey, the Middle East is the main subject of study for 4.5% of researchers of the countries consulted (Argentina, Brazil, Chile, Colombia, and Mexico). Of them, in the case of Argentina, Colombia and Mexico, the large majority considered themselves working from a Realist perspective. In the case of Brazil and Chile, the majority considered themselves doing so from Via Media Constructivism's postulates.

Among the universities that the 2017 TRIP survey interviewees considered better for the study of IR in their countries³, only El Colegio de México has a space specifically dedicated to the study of the Middle East⁴. Moreover, the study of the Middle East is mandatory only for IR undergraduate programs in Mexico. By analyzing undergraduate and postgraduate theses, Marta Tawil Kuri has made a useful review of Mexican IR studies about the Middle East (Tawil Kuri, 2016). The author identified the main topics in IR theses on the Middle East and the most used theories. From her review it is possible to conclude that the study of the Middle East from Mexican IR is imbued with a peripheral orientalist perspective that feeds from theoretical lenses constructed in the West/North. My hypothesis is that this feature can be generalizable to all Latin American IR. In other words, this paper asserts that Latin American IR writing of the Middle East is mainly the product of the intertwining between mainstream IR assumptions and peripheral orientalism.

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⁴ El Centro de Estudios de Asia y África.

3 ON METHODOLOGY

To define the Middle East according to Latin American scholars' conceptions, in 2019 I conducted a survey with members of the Latin American Council of Social Sciences⁵ Working Group called "Latin America and the Middle East". As a result, the Middle East appeared as constituted by the following countries: Bahrain, Egypt, Iran, Iraq, Israel, Jordan, Kuwait, Lebanon, Libya, Oman, Palestine, Qatar, Saudi Arabia, Syria, Tunisia, Turkey, United Arab Emirates, and Yemen.

The text presents an analysis of papers working on the Middle East as defined above published between 2011 (when the Arab uprisings started) and 2019 (before the breakup of the Covid pandemics) in the following Scielo indexed IR journals: *Colombia Internacional* and *Revista Relaciones Internacionales, Estrategia y Seguridad* (Colombia), *Contexto Internacional* and *Revista Brasileira de Política Internacional* (Brazil), *Estudios de Asia y África* and *Foro Internacional* (Mexico), *Estudios Internacionales* (Chile), and *Revista de Relaciones Internacionales* (Argentina). Out of a total of 1009 articles published in these journals during these years, 28 of them focused on the Middle East and were written by researchers based in Latin America, representing 2.9% of the published articles. International Security and Foreign Policy were the main subfields from which authors read the region, 89.6% of the selected texts being inserted in these subfields.

The analysis sought to answer the following questions: a) What topics do the articles address? b) What are the cases selected to illustrate the object of study? c) On what

sources are the studies based? d) What are the theoretical frameworks used in these papers? e) What are the ontological and epistemological assumptions underpinning the texts?

4 ANALYSIS

To organise the presentation of the analysis, this section is divided into two parts. The first is devoted to texts working on issues related to International Security (IS) and the second to those dealing with topics related to Foreign Policy (FP). While the majority of the texts were easy to classify in one of these two categories, some of them eluded an immediate categorization because they dealt with both state policies and international security issues. In each of these cases, the distinction criterion has been the text itself: if it placed itself within FP analysis or made explicit its object of study was FP, then it was classified as an FP text, if not, as an IS text. Each of the subsections is introduced by a table organising the texts to facilitate their identification.

⁵ CLACSO

4.1 International Security (IS)

Table 1 – Articles on IS and the Middle East: references

Journal	Title	Year	Ref.
Colombia Internacional	International Security and Multilateralism: International Organizations and Intervention in Libya. (QuerajazuEscobari, 2012)	2012	Col. 1
	From The Thirty Years War to 21st Century Jihad. A Prelude to Secularization? (Der Ghougghassian, 2013)	2013	Col. 2
Contexto Internacional	Iran Talks: From Words to Acts. The Tehran Declaration and the Geneva Joint Action Plan in Perspective. (Rocha; Pereira, 2014)	2014	Ctx. 1
	The Core of Resistance: Recognising Intersectional Struggle in the Kurdish Women's Movement. (Ferreira; Vinicius, 2018)	2018	Ctx. 2
Estudios de Asia y África	Water, Power, and Hegemony between State and Non-State Actors in Turkey, Syria, and Iraq. (Conde, 2017)	2017	EAA 1
	Political Islam's Contentious Action during the Hegemonic Crisis of the Secular State in the Middle East: Egypt and Iran's Cases. (Garduño García, 2019)	2019	EAA 2
EstudiosInternacionales	The Palestinian-Israeli Conflict through the Light of Hydropolitics and the Transgression of the Right to Water. (Vázquez Méndez; Martínez Montañez, 2018)	2018	EI 1
	The Sunni Jihad of the Islamic State and Al-Qaeda: Islamism, Anti-Imperialism, and Political-Messianic Nihilism? (Ortiz; Caro, 2018)	2018	EI 2
Foro Internacional	Humanity in Limbo. Turkey's International Protection System in the Face of the Humanitarian Crisis of the Syrian Conflict. (Souto Olmedo, 2018)	2018	FI 1
Revista de Relaciones Internacionales, Estrategia y Seguridad	Europe in Face of the Threat of Islamic State's Religious Radicalism. (Melamed Visbal, 2016)	2016	RIES 1
	Relations in the Gulf After the 'Arab Spring' and their Impact in the Region. (Cuadro, 2016)	2016	RIES 2
Revista Brasileira de Política Internacional	Exploring the Interplay between Framing and Securitization Theory: the Case of the Arab Spring Protests in Bahrain. (Carvalho Pinto, 2014)	2014	RBPI 1

41% of the analyzed texts deal with issues related to IS. Generally speaking, they do not constitute a homogeneous field but, on the contrary, one characterized by dispersion. Thus, of the 12 analyzed texts, four deal with political Islam (Col. 2, EAA 2, RIES 1, and EI 2), two deal with the issue of natural resources -specifically water- (EAA 1 and EI 1), one works on the functioning of multilateralism in relation to the region (Col. 1), one on Iran's nuclear program (Ctx. 1), one on the relationship between women and conflict (Ctx. 2), and one

is of a theoretical nature (RBPI 1). This characteristic dispersion is repeated in relation to the cases addressed by the texts: two work on the conflict in Syria (Ctx. 2, FI 1), three others work on the Gulf (RIES 2, RBPI 1), one on the intervention in Libya (Col. 1), one on the Palestinian-Israeli conflict (EI 1), and one on the nuclear agreement with Iran (Ctx. 1). Other countries in the region covered are Turkey (FI 1) and Egypt (EAA 2).

Although some issues of common interest can be identified, one outstanding characteris-

tic is that the texts do not dialogue with each other, but rather with the literature and issues raised by the academy in the North. This becomes apparent when analyzing the bibliographical sources used by the texts: while 71.8% of the total bibliographical references belong to authors working in North America (31.6%) or Europe (40.2%), 19% belong to authors from the Middle East and only 5.8% to Latin American authors. The remaining 3.4% is accounted for by literature written by authors working in Australia, Asia, or Africa. Besides, none of the analyzed texts resorted to theoretical frameworks developed in Latin America or the Middle East. Thus, names such as Robert Keohane, John Ikenberry, Samuel Huntington, Barry Buzan, Stephen Walt, and Kenneth Waltz are repeated as theoretical underpinnings of the analyses produced by Latin American authors.

The majority of the analyzed texts are based on a substantialist ontology and on philosophical rationalism assuming rational pre-given actors. Three types of actors appear in these texts: state, non-state (Islamic movements), and international organisations (UN). Rationalism is ascribed to both state and non-state actors: 'Islamism (jihadism) certainly makes use of fundamentalism, but it operates with religion in a selective way, not hesitating to violate "God's commands" if any of them oppose its power objectives' (Ortiz; Caro, 2018, p.42). This instrumentalist conception of Islam is, paradoxically, accompanied by a certain essentialist reading asserting that "The geopolitical conflict between Islam and the West (Christian world) goes back to the very origins of Islam, because these are two global religious and political systems seeking hegemony" (Ortiz; Caro, 2018, p.46).

Rationalism is strongly linked to epistemological positivism which, however, in most

of the texts under analysis lacks explanatory ambitions, restricted to descriptive objectives. Despite the importance of the cultural dimension in the analysis of the Middle East from Latin American IR -mostly evidenced by the frequent use of religion as an explanatory variable (Tawil Kuri, 2016; Cuadro, 2019), materialism is another characteristic of these texts. This way, in general, conflict in the Middle East is explained by a combination of both cultural characteristics (Islam) and the struggle over scarce material resources (oil, gas, water). By way of example, EI1 can be mentioned, where water conceived as a scarce resource is presented as the axis of the Israeli-Palestinian conflict.

Rationalism, culturalism, and materialism are identifiable assumptions even when the texts are based on very heterogeneous theoretical frameworks. In the case of the analyzed texts, they are mostly underpinned by Institutional Neoliberalism (Col. 1), Securitisation Theory (Col. 2 and RBPI 1), Neo-Gramscian perspective (EAA 2), and Geopolitics (EI 1). Notwithstanding this diversity, they all share these epistemo-ontological assumptions.

Texts based on a relational ontology are a sounding minority. Among texts dealing with IS issues, it is possible to place within this category Ctx. 2. This text is a clear example of a relational and reflectivist perspective. The text shows how spaces, subjectivities, and political forms that substantialist ontology takes as pre-given are produced through relational practices. Although the text uses a greater heterogeneity of sources, their distribution follows the logic of the North as theory producer and the South as data collector. Thus, the theoretical underpinning is provided by European or North American authors such as Patricia Hill Collins, Nira Yuval-Davis, Carole Pateman,

Wendy Brown, and Cynthia Enloe. In contrast, many of the references to the empirical case study are by Middle Eastern authors -especially, Turkish. This way, it reproduces the logic underlying the division of intellectual labour

articulated by postcolonial thinkers: while the North provides the theoretical frameworks, the South is relegated to the position of either a mere provider of data or a laboratory for the application of the former.

4.2 Foreign Policy (FP)

Table 2 -Articles on FP and the Middle East: references

Journal	Title	Year	Ref.
Colombia Internacional	Colombia and Israel under the Uribe Administration: Partners in the Global War on Terror. (Bernal, 2015)	2015	Col. 3
Contexto Internacional	The Delegitimation of the Iranian Nuclear Program in Benjamin Netanyahu's Speech. (Souza, 2015)	2015	Ctx. 3
	Signalling for Status: UAE and Women's Rights. (Carvalho Pinto, 2019)	2019	Ctx. 4
EstudiosInternacionales	Ricardo Lagos' «NO» to Irak Invasion in 2003: The Foreign Policy Decision-Making Process in Chile. (Bywaters, 2014)	2014	EI 3
Foro Internacional	Patterns of Mexico's Voting at the UN General Assembly between 1994 and 2015: Middle East and Palestine Issues. (Paredes Frías; Contreras Piñas, 2017)	2017	FI 2
	The Arab Public Sphere and Qatari Foreign Relations since 1995. (Viramontes, 2019)	2019	FI 3
	Continuity and Adjustments in Mexican Foreign Policy towards the Arab World and the Middle East: The Economic and Political Agendas. (Tawil Kuri, 2019)	2019	FI 4
Revista de Relaciones Internacionales, Estrategia y Seguridad	Turkey's Soft Power and Cultural Diplomacy: Analysis of Historical and Regional Factors. (Guerrero Turbay; Jaramillo Jassir, 2013)	2013	RIES 3
	International Relations of the Syrian Civil War: the United States and Russia in the Struggle for International Power. (Ghotme; Ripoll, 2014)	2014	RIES 4
	Active Neutrality. Comparative Perspective between Colombian and Turkish Foreign Policies. (Guerrero Turbay; Jaramillo Jassir, 2015)	2015	RIES 5
	The Emergence and Increase of Anti-Semitism in the Governments of Hugo Chávez and its Relationship with the Deepening of the Relations between Venezuela and Iran (2005-2013). (Figueroa Sepúlveda, 2018)	2018	RIES 6
Revista Brasileira de Política Internacional	The Essential Role of Democracy in the Bush Doctrine: the Invasions of Iraq and Afghanistan. (Santos; Teixeira, 2013)	2013	RBPI 2
	From Tegucigalpa to Teheran: Brazil's Diplomacy as an Emerging Western Country. (Steiner; Medeiros; Lima, 2014)	2014	RBPI 3
	Debating US Military Strategy in the Persian Gulf: What is the Way Forward? (Lilli, 2018)	2018	RBPI 4
	Brazil, the United States, and the Tehran Declaration. (Oliveira; Santos, 2018)	2018	RBPI 5
	Brazil's Policy toward Israel and Palestine in Dilma Rousseff and Michel Temer's Administrations: Have there Been any Shifts? (Vigevani; Calandrin, 2019)	2019	RBPI 6

Sixteen articles can be included within the subfield of FP, representing 55.2% of the analyzed texts. Out of these, eight (50%) are concerned with a Latin American country's FP towards the Middle East (mostly, Brazil's and Mexico's), four of them (25%) work on a Middle Eastern country's FP, three (18.75%) deal with global powers' FP towards the Middle East [This sentence is confusing. Please consider reviewing it] and one article (6.25%) establishes a comparison between a Latin American country (Colombia) and a Middle Eastern one (Turkey).

Despite the fact that 50% of the texts are devoted to the study of Latin American countries' FPs, references to Western (North American and European) publications and authors also predominate in this sub-field. Thus, while the latter account for 62% of the references used by Latin American authors, literature from our region accounts for only 28.7% of the citations. On the other hand, even though 25% of the texts deal with FPs of Middle Eastern countries, publications and authors from this region only account for 7.4% of the total references within this sub-field.

Regarding theoretical literature and frameworks used, theory put in motion is mostly that developed in the North, even despite the importance of the "Latin American hybrid" (Tickner, 2002), for the region's IR field [This sentence is confusing. Please consider reviewing it]. Indeed, the concept of autonomy, key to this perspective [This sentence is confusing. Please consider reviewing it], is used as a lens of analysis only in RBPI3 and it is not central to the text. Other theoretical frameworks used include diverse variants of Realism (RIES4 and RBPI4), Constructivism (RBPI2 and Ctx.4), and FP Analysis (EI3, Col.3, and RPBI3),

Liberalism (RIES3), and "Postmodernism" (Ctx.3). Five texts lack any explicit theoretical discussion.

The predominance of these theoretical frameworks is accompanied by a substantialist ontology [This seems to be incredibly important for the authors' argument and therefore should be explained to the reader] this is, an idea that the international is constituted by pre-existent states that later enter into relations- and an epistemological positivism⁶. Indeed, 11 out of the 16 articles have explanatory objectives and are structured around independent and dependent variables.

Philosophical rationalism predominates in these articles and interests appear in all these cases as independent variables. As a way of example, in the case of EI3, Ricardo Lagos' interest in strengthening multilateral institutions in order to balance powerful states appears as the explanation of his negative vote to the invasion of Iraq in 2003. In RBPI6, the inexistence of changes in Brazilian FP towards the Middle East during both Dilma Rousseff's and Michel Temer's governments is explained by structural objectives as "international participation and global interests; diversified economic interests; internal political, social, cultural balances; foreign policy memory and tradition" (Vigevani; Calandrin, 2019, p.21) and complementary interests among Brazil and the Middle Eastern region.

A minority of the analyzed texts (RBPI2 and FI3) are based on a relational ontology and on a post-positivist epistemology. RBPI 2 is framed within radical constructivism to argue how the export of democracy was part of

⁶ For literature on the epistemo-ontological debate, see Jackson and Nexon, 1999; Hamilton, 2017; Cuadro, 2024.

George W. Bush's strategy in his interventions in the Middle East as part of the Global War on Terror. For its part, FI4 gives centrality to the concept of Arab public sphere. The notion is an adaptation of the Habermasian idea of public sphere and appears as an intervening variable that helps understanding Qatar's FP actions. The text is based on an ontology that eludes the dichotomy agency/structure and, instead, makes an accurate application of structuration theory asserting that the Arab public sphere "informs and affects" (Viramontes, 2019, p.13) the Gulf country's foreign relations. In both cases a certain rationalism proper to the idea of agent is maintained, but it is a conditioned rationalism closer to the constructivist idea of language as a social instrument.

CONCLUSION

The analysis showed that the main traits of the overall discipline of IR in Latin America (epistemological positivism, ontological substantialism, rationalism, and materialism) are reproduced in the study of the Middle East. Indeed, with a few exceptions, there is a general reproduction of the ontological, epistemological, and theoretical assumptions of Western/Northern IR to which peripheral orientalism (Taboada, 1998) is added.

The majority of the analyzed texts are based on a substantialist ontology and on philosophical rationalism assuming rational pre-given actors. Rationalism is strongly linked to epistemological positivism. In texts dealing with IS issues, this epistemological assumption does not lead to explanatory ambitions. This is not the case with texts tackling FP affairs, most of them looking for independent variables of rational actors' behaviors. When explanations

are given, they oscillate between materialist and culturalist causes.

Only one of the 28 analyzed texts uses a theoretical framework developed in Latin America, the rest reproduces the logic underlying the division of intellectual labour articulated by postcolonial thinkers: while the North provides the theoretical frameworks, the South is relegated to the position of either a mere provider of data or a laboratory for the application of the former. This feature is more striking when 8 of these texts deal with some Latin American country FP. On the other hand, it can explain that the analyzed texts do not dialogue with each other, but rather with literature and issues raised by the academy in the North.

Why is it important to study and reflect on how we know other regions of the 'Global South'? Primarily, because knowledge works in tandem with power and subject. This means that truth is a social construction that is inseparable from the power relations that sustain and effect it, and that the knowledge we practice constitutes us subjectively. To forge other social and political relations, it is essential to critically analyse those we already practice. As said in the Introduction, Social Sciences in general and International Relations in particular have played a significant role in the essentialization and homogenization of cultures. This text has enquired into how we in the Global South participate in it reinforcing the Western ideal.

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