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Latin America and Beyond: The Case for Comparative Area Studies

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Abstract

Comparative Area Studies (CAS) emerges as a new approach in which scholars of Latin American Studies engage systematically with scholars working on other world regions. Adopting a focus on intra-, inter- and cross area comparisons, CAS builds on the traditional strengths of area studies. At the same time it enables scholars to have a stronger impact on overarching conceptual debates and it may provide new bridges between area studies scholars and the academic communities in the regions studied. However, a comparative area studies approach requires systematic cooperation among scholars of different world regions, and adequate organizational and institutional structures to support them. *Keywords:* area studies, comparative area studies, Latin American studies, research methods.

Resumen: Latinoamérica y más allá: El caso de los estudios regionales comparativos

Los Estudios Regionales Comparativos (Comparative Area Studies – CAS) surgen como un enfoque nuevo dentro del cual académicos de Estudios Latinoamericanos colaboran sistemáticamente con académicos que investigan sobre otras regiones del mundo. Tomando como punto de partida comparaciones intrarregionales, interregionales y transregionales, los ERC se basan en los puntos fuertes tradicionales de los estudios regionales. Al mismo tiempo, este enfoque permite a los académicos tener un impacto mayor en los debates conceptuales más amplios y puede tender nuevos puentes entre los académicos de estudios regionales y las comunidades académicas de las regiones estudiadas. Sin embargo, un enfoque de estudios regionales comparativos exige una cooperación sistemática entre académicos de distintas regiones del mundo y unas estructuras organizativas e institucionales adecuadas para apoyarles. *Palabras clave:* estudios regionales, estudios regionales comparativos, estudios latinoamericanos, métodos de investigación.

Focusing on Latin America and the Caribbean as a field of study (or the focus of a journal, as in the case of *ERLACS*) is a statement in itself: It conveys the argument that there is something specific about these societies which makes it useful to study them together, and to distinguish them from other possible groupings (Whitehead, 1994, p. 1). In this sense, area studies – even if focused on a single world region – seem inherently comparative by nature.¹

This article proposes to make the comparative nature of Latin American Studies more explicit than it often is. It argues for a notion of Comparative Area Studies (CAS) that endorses an approach of explicit intra-, inter- and cross area comparisons which builds on the traditional strengths of area studies while at the same time enhancing their impact on broader conceptual and methodological debates. Such an approach, however, requires the systematic cooperation between scholars with in-depth knowledge of different world regions and their respective global connections; and it requires adequate organizational and institutional structures to support their cooperation.

The long shadow of the area studies debate

During its 50 years of existence, *ERLACS* has been part of the remarkable success story of Latin American Studies. Taking just one indicator to illustrate the rapid growth of these studies, the meetings of the Latin American Studies Association – turning 50 next year – have become truly massive events with the congress in 2015 drawing more than 5,000 participants.

However, a constant companion to this development has been the criticism and at times outright disrespect from the so-called systematic disciplines against all area studies, such as Latin American Studies. In what some have called the ‘area studies war’ (Waters, 2000) area studies have been criticized for their supposed ‘horizontal ignorance’ – for being parochial, immersed in region- or country-specific knowledge but unable to look beyond it, lacking in theoretical and methodological rigor, and hence having an inability to arrive at generalizable findings that ‘speak’ to a broader scholarly community. Area studies scholars have rebutted such criticism many times, starting with the fact that they themselves usually have a solid disciplinary background and that it is more the combination of disciplinary and regional expertise which is at the base of area studies, not an either/or. From this basis, area studies scholars have been bashing the ‘generalists’ from mainstream disciplines for their ‘vertical ignorance’ – their lack of language and cultural understanding, shallow historic depth, and ignorance of the scholarly work emanating from the countries or areas themselves (e.g. Szanton, 2004). (These examples are drawn from political science as this is the field I know best. While similar debates have surfaced in other disciplines as well, a more detailed look than this brief article allows would shed light on important differences between the different disciplines.)

While the aggressiveness of the ‘area studies war’ may now have given way to some sort of peaceful co-existence (Bates, 1997; Harbeson, et al. 2001), the underlying challenges remain. This article argues for a Comparative Area Studies (CAS) approach as a promising way (by no means the only one, of course) for Latin American and Caribbean studies scholars to move forward.

Making comparisons explicit

‘And what should they know of England who only England know?’, Rudyard Kipling (1891) once famously asked. For social scientists, the need to compare seems inevitable. To understand what is specific about a given polity one needs to know others. To identify the distinctive characteristics of culture, politics, society or economy in Latin America and the Caribbean, we need to see these in the light of culture, politics, society or economy elsewhere.

The comparative area studies approach argues to make this comparative perspective explicit rather than leaving it implicit. In case of the latter, all too often the authors’ own background tends to be the built-in comparative horizon by which they structure, measure and judge the empirical realities they study. In area studies this has a long pedigree. If we think of Tacitus as one of the early forefathers of western area studies scholarship, his ‘Germania’ describes the Germanic tribes along the categories of the author’s imperial Roman society – from public affairs to family law, from social hierarchies to wealth and trade – and then describes all he finds to deviate from the Roman template.

Similarly, since the nineteenth century, modern area studies have emerged as a ‘child of empire’, often driven by political and commercial interests or the perceived ‘civilizing mission’ of the colonial powers. They have ever since been criticized for their built-in Euro-centrism: that the colonial powers (or later the OECD world) set the norms and yardsticks to which the rest of the world had to measure up. In this tradition, area studies have been about ‘the others’. There are no ‘German studies’ in Germany, nor are there ‘Brazil studies’ in Brazil. At home, it seems, the multi-disciplinary approach that characterizes area studies scholarship is blocked by the deeply rooted separation of academic disciplines and departments. Remarkably, this concept of area studies as being about ‘the others’ has also been replicated outside the traditional ‘West’; the current expansion of area studies centres in China provides ample illustration.

From its origins, the perspective of area studies on ‘the others’ was attached to profound asymmetries of power and knowledge production. Over the past decades, however, scholarship from Latin American authors on Latin American issues has been absolutely key in enriching and dynamizing the field in recent years, and it has proven to be one of the most innovative and most rapidly expanding elements of organizations such as the Latin American Studies Association or in international journals dedicated to Latin American affairs. These scholars often do not identify themselves as ‘area studies’, just as few

U.S. scholars working on U.S. politics would. As a consequence, seeking clear delimitations between ‘area studies’ and ‘the discipline’ is becoming ever more futile. This, however, should not be seen as a problem, but rather as a strength of area studies. An ability to bring together, on equal footing and without pre-established biases different disciplines, different traditions of scholarship and different perspectives, united by a consciously chosen regional focus is key.

Still, some who see the blurring lines of area studies as an inherent problem opt for seeking refuge in the so-called systematic disciplines and declare area studies obsolete. However, the problem of doing research on ‘the others’ is by no means exclusive to area studies, but also very much present (though less reflected upon) in the disciplines. Take political science with one of its core sub-disciplines – comparative politics – carrying the notion of comparing in its very name. In practice, however, its mainstream reproduces the traditional area studies focus on ‘the others’, as Adam Przeworski points out when he describes the dominant understanding of comparative politics in the U.S. as ‘one where Americans go out and study other countries’ (Przeworski 2003, p. 59). If U.S. scholars work on elections or social movements or health policy in the U.S., they do *political science* or *government*. However, if U.S. scholars work on elections or social movements or health policy in Brazil, they do comparative politics. Przeworski goes on to say: ‘Now, I ask myself: “What do Brazilians do when they study Brazil?”’ (Przeworski, 2003, p. 59).

Rather than declaring area-specific expertise obsolete, the area-specific context of research should also be made explicit where most of the time it is not. Studies on the U.S. political system cannot pretend to be on *government* per se, but on a specific, contextualized version of it – just as Brazil’s area studies have been said to provide ‘bounded generalizations’ (Bunce, 2000), which are valid within the confines of their local or regional context; this, however, is just as true of many political science studies, even if they treat their cases as if they were universal models.

Intra-, inter-, cross-area comparisons

This article does not claim to invent something totally new. Quite the contrary, the case for comparative area studies can build on the impressive body of work that Latin American Studies scholars have undertaken over the past decades. To structure the field it is useful to distinguish three types of Comparative Area Studies (Basedau & Köllner, 2007, p. 11):

- o Intra-regional comparisons which compare entities within a specific area, e.g. different Latin American countries. This can also apply to sub-national units such as provinces or cities, and, of course, it can also compare different actors, institutions or practices within an area.
- o Cross-regional comparisons, which compare cases from different world regions, such as the different development trajectories of East Asia and

Latin America (e.g. Kay, 2002) or the politics of taxation and their impact on race in Brazil and South Africa (Liebermann, 2003).

- o And finally inter-regional comparisons which take world regions as a whole as the unit of analysis and explore the differences and commonalities between them; examples are the classic comparative studies on the transitions to democracy in Southern Europe and Latin America (O'Donnell et al., 1986) or the World Value Survey which maps the different support for values and attitudes across world regions (Inglehart & Wenzel, 2005).

Regions, it must be noted, are no given fact but socially constituted along, but not only, geographic, historic or cultural lines. As such, what constitutes a region or sub-region and what is the appropriate term for it will always be subject to debate. While it is easy to see that the precise limitations and concepts demarcating 'Europe' or the 'Middle East' are difficult to pin down, does this also apply to the study of Latin America – or Latin America and the Caribbean? South America? The Americas?

In Latin American Studies intra-regional comparisons have by far been the most common comparative framework. In contrast, cross- and inter-regional comparisons have been much less frequent. The reasons are easy to see. Inter-regional comparisons tend to wipe over the diversity existing within a region; they build on large-N studies and aggregate data which have been the domain of mainstream economics and comparative politics rather than traditional area studies. Cross-regional comparisons, too, are a difficult setting for area specialists as few will have the same profound knowledge of culture, language and society for more than one world region.

These problems, however, should not make Latin American Studies scholars desist from venturing into comparisons beyond the region. This simply is too important. If focusing scholarship on a specific area – however that may be defined – is to be more than just an arbitrary parcelling out the world, then the category of 'area' needs to be substantiated. The question of the specificities of Latin America and the Caribbean then is not one amongst many, but is at the core of legitimating the field of study as such. This, however, cannot be achieved by intra-regional studies alone but requires the confrontation with out-of-area realities through inter- or cross-regional comparisons. For this, the often implicit assumptions underlying the area studies approach need to be made explicit.

If intra-regional studies can arrive at bounded generalizations for the validity (or not) of theoretical propositions under the scope conditions of their regional context, this leaves two interrelated questions: What specifically is it that binds this regional cluster? And what happens if such a 'bounded generalization' is being tested beyond its bounds? In this sense, comparative area studies takes up the idea of making concepts travel – however, freeing it from the bias of the past, when all too often conceptual travels meant a one-way road, exporting concepts generated in the OECD countries to the rest of the world. In

this sense, it is part of the challenge of comparative area studies to overcome the hierarchic order of countries and regions underlying much of conventional scholarship.

In the past, area studies have excelled in qualitative research and small-N analyses or case studies in which in-depth knowledge of the empirical realities is key to gain scholarly insights. In contrast, they have tended to be sceptical about quantitative and large-N approaches, often leaving these to scholars from comparative politics or other disciplines, criticizing their superficial knowledge of the Latin American cases and their unreflected use of supposedly universal categories and coding which were seen as hardly fitting reality.

As Ahram (2011, p. 72-77) has shown, quantitative cross-area studies by and large fail to account for regional variation. Surveying 741 articles from seven leading political science journals he concludes that even in the minority of cases where 'they even bother to test for regional variation, large-N studies remain at a loss to explain it' (Ahram, 2011, p. 77). Large-N analyses may find regional clustering of correlations, but in many cases it will be up to scholars with area expertise to make sense of them.

In part reacting to the limitations of quantitative regression analyses, mixed method-approaches have become popular. Approaches such as Lieberman's (2005) 'nested analysis' seek to bring the strengths of both to bear. They can be a fruitful field for Latin American Studies scholars with a background in qualitative empirical research to work hand in hand with their colleagues from the large-N quantitative side.

In recent years area studies scholars have made important contributions to a research agenda that stresses trans-national and trans-regional connections, interdependencies and entanglements, challenging the idea of the nation-state as a 'container', to be studied separately from its environment. It would be short-sighted to see this as contrary to comparative approaches. These in no way have to be wed to what some have called 'methodological nationalism' (Wimmer & Glick-Schiller, 2002). Quite to the contrary: Precisely to identify the impact of international and trans-regional relations a comparative perspective can be extremely helpful, as it allows the identification of factors that contribute to similar or different outcomes in the phenomena under scrutiny.

Institutional requirements for Comparative Area Studies

Cross-area comparisons can, but of course do not have to resort to quantitative methods but can also build on the strengths of in-depth qualitative studies. Sil (2009) has eloquently made the case for the crucial role qualitative cross-regional small-N comparisons can play in helping area specialists make the empirical and theoretical value of their research more obvious to comparatists focused on general theories and models (Sil, 2009, p. 26).

However, the call for Latin America-focused scholars to engage more in inter- and cross-area studies runs up against the dilemma of 'but nobody does

area studies'. By and large, area studies-scholars are single-area studies scholars. There is a Latin American Studies Association and similar organizations for scholarship on Africa, Asia, the Middle East or Eastern Europe, but there is no internationally relevant 'Area Studies Association' as such. Moreover, there are good reasons for it: for one researcher to become a specialist in many areas is a tall order. Sil's argument that 'there is no inherent reason, other than the pressure to publish more quickly, why one cannot patiently increase one's familiarity with cases' (Sil, 2009, p. 29) will not convince many if this implies learning Japanese, Russian and Mandarin at the same time.

Rather than burdening the individual scholar with oversized ambitions, the key is collaboration. If it makes sense to comparatively study, say, the impact of the Internet on state-society relations in China, Vietnam and Cuba, then the organizational response would be for scholars with expertise in these three countries to team up in a joint research endeavour. However, this also requires institutional facilities that can make it possible – which in turn means overcoming the traditional division into single-area studies containers with little need to speak to each other.

In the past area studies found institutional answers to the challenges of multi-disciplinarity. Similarly, cultivating the institutional grounds for comparative area studies requires a wide range of activities. Universities could create forums to promote systematic intellectual exchanges between their different region-focused studies centres; area-specific graduate or post-graduate programmes could include seminars that foster comparative perspectives to other world regions; area studies associations could organize joint conferences or call for shared panels to develop comparative area studies; journals could work together on special issues; it would be up to funding bodies to establish specific programmes that specifically seek to enable collaborative cross-area research or to honour cross-area approaches in their evaluation criteria.

To draw on personal experience, the institution I work at is an example for the institutional transformations that are required for a comparative area studies to take root. Ten years ago the German Institute of Global and Area Studies, GIGA for short, had been merely loose umbrella for four rather disconnected centres on Asia, Africa, Latin America and the Middle East, respectively. It required a major institutional overhaul to establish a structure with cross-cutting research programmes in which the scholars from different area backgrounds continuously interact. This provides the indispensable breeding-ground for generating collaborative research proposals or working on joint publications that strive for comparisons beyond the confines of any one of the regional units.

As each academic is embedded as much in one of the four area institutes as in one of the four thematic research programmes, the intellectual mind-sets had to change. Scholars working on the Internet's impact on state-society relations in China and Vietnam discovered that the Cuban experience on the matter was of much more relevance to them than that of the regional neighbours. Col-

leagues from different backgrounds teamed up to see if the analytical framework of neo-patrimonialism, broadly applied to Africa in the past, could be usefully applied to Latin American cases. Others drew up a research project to study the role of supreme and constitutional courts in politics in three South American as well as in three African countries (Llanos et al., 2015). To further promote the idea, an international award was established which bi-annually honours articles that excel at living up to the promises of Comparative Area Studies.²

Of course, approaches of this type face their own set of problems. There are limits on how symmetric research designs can be when, for instance, in Argentina, Chile and Paraguay, a study on the role of courts builds on a broad literature on the matter, whereas in Benin, Madagascar and Senegal much is pioneering work, and the researchers are often the first ever to interview the judges or go through the court's archives. Language issues also matter. The dominance of Spanish and Portuguese makes it comparatively easy for scholars of Latin America to look beyond single country experiences, whereas Asia's language diversity makes many scholars more strongly attached to the countries in which the language of their expertise is spoken. For Latin America and the Caribbean a small team can take on a continent-wide, primary sources-based analysis of, for instance, legislation on migration policies, whereas in Asia this would require knowledge of more than a dozen languages and require a correspondingly high staff effort.

Comparative Area Studies, to repeat, is no panacea; cross-area comparisons are not always feasible and do not always make sense. There is no claim that Comparative Area Studies are in any way superior to other forms of scholarship. But the argument in its favour is that such an approach contributes to new insights, and enables area studies to have a stronger impact on overarching conceptual debates. Neither is Comparative Area Studies meant to undermine Latin American Studies. Quite the contrary! By contrasting Latin American experiences with those of other world regions it should sharpen our understanding of what is specific about the region, and what the study of the region can contribute to our general understanding of the workings of the world we live in. In doing so it can also show why we should continue developing Latin American and Caribbean Studies as a distinct field of scholarly attention which, hopefully, will have a forum like *ERLACS* for another 100 issues.

* * *

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ship: web-based voice and digital media in socialist Cuba, in Anita Breuer & Yanina Welp (Eds.), *Digital Technologies for Democratic Governance in Latin America* (pp. 200-216), Abingdon: Routledge, 2014.

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Notes

1. For a working definition of 'area studies' see Mehler & Hoffmann, 2011, p. 86: 'Area studies is the generic term for multidisciplinary research that focuses on specific geographic regions or culturally defined areas.'
2. <https://www.giga-hamburg.de/en/news/call-for-nominations-for-giga's-cas-award>

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