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# The Modernization Turn in Chinese Middle East Studies since the Reform and Opening Up of 1978

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**ABSTRACT**

This article argues that Chinese scholarship on the Middle East has experienced a pronounced modernization turn since the 1978 Reform and Opening Up. Drawing on the re-establishment of Area Studies institutions and the maturation of China's own modernization theories in the 1980s, early work produced pioneering analyses of developmental trajectories in latecomer societies. From the 1990s to the early 2000s, the professionalization and institutional standardization of Middle East studies in China fueled rapid growth in the field, with research increasingly focused on pathways to modernity, revolutionary transformations, and nation-state construction in the region. In the wake of the Arab uprisings, Chinese scholars have integrated the paradigm of modernization with emergent political and economic crises to offer novel insights into how livelihood and developmental concerns can mitigate regional conflicts. Despite significant advances in theoretical frameworks and methodological rigor, Chinese studies on modernization in the Middle East still have opportunities for further progress in disciplinary consolidation, agenda-setting, fieldwork depth, and the production of high-impact scholarly outputs.

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Since the mid-twentieth century, modernization (*Xiandaihua* 现代化) has provided a core theoretical lens for Chinese scholars to examine the countries of the Global South. In this context, the Middle East – which was the earliest region in Afro-Asia to embark on modernization – has attracted sustained attention from Chinese researchers. The region's modernizing trajectory began in the nineteenth century with the Ottoman Tanzimat reforms (Lewis 1961; Zürcher 1993), Muḥammad ʿAlī's Europeanizing reforms in Egypt (Abir 1977), and Amīr Kabīr's reform in the Qajar dynasty of Iran (Ji 2015; Shahriari 2017). In the twentieth century, the emergence of independent nation-states – Turkey (1923), Iran (1925 constitutional revolution), Saudi Arabia (1932), and Egypt (nominal independence 1922) – gave rise to

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indigenous experiments in modernization reform alongside autonomous nation-state building.

Large-scale modernization efforts and reforms in the Middle East, alongside China's own drive toward modernization, both commenced in the latter half of the twentieth century, reaching a peak in the 1980s. From this period onward, with the advent of China's Reform and Opening Up policy (*Gaige Kaifang* 改革开放, launched December 1978) and introspective assessment of its own modernization,[1] Chinese Middle East studies shifted from earlier ideology-driven frameworks toward comprehensive, multidimensional analyses of political, economic, social, and cultural modernization in the region. This focus on modernization in Chinese Middle East studies since the Reform and Opening Up reflects the Chinese academic community's endeavor to construct an autonomous knowledge system for Middle East research.

Over the past two decades, scholars have extensively investigated the production of knowledge in Chinese Middle East studies. In-depth analyses of multiple facets of Chinese Middle East studies from the establishment of the People's Republic of China to the early twenty-first century have been conducted, which have encompassed its current status, accomplishments, discourse frameworks, disciplinary development, challenges, and potential solutions (Cheng 2010; Gong 2009; Pu and Li 2018; Sun 2011; Wang 2010, 2018; Wang and Wang 2021; Yang 2005, 2010; Zhang and Li 2024). While these investigations have significantly enriched the academic historiography of the field, there remains considerable scope for exploring alternative research paradigms. This article examines the development of knowledge production in Chinese Middle East studies since the Reform and Opening Up using the framework of modernization research.

Modernization is generally conceptualized in Chinese research as the transition from a traditional society rooted in an agrarian economy to a modern society underpinned by an industrial economy. This transition primarily involves economic modernization, but it also extends to transformations across political, social, ideological, and cultural domains based on a country's basic national conditions (He 1995; Qian 2012, 2023). Lin and Dong (1998, 150) have proposed that China's modernization research paradigm evolved through stages from evolution to revolution and ultimately to modernization. This article suggests that Chinese research on the Middle East has followed a broadly analogous trajectory, which can be divided into three phases: the initial stage from the onset of Reform and Opening Up to the early 1990s; the rapid developmental phase from the early 1990s to the early 2000s; and the new directions emerging since the upheavals in the Middle East. The article concludes with an overall assessment of the turn toward modernization in Chinese studies on the Middle East.

[1]At the outset of Reform and Opening Up, on March 21, 1979, Deng Xiaoping creatively introduced the novel concept of 'Chinese-Style Four Modernizations'. During a meeting with a British delegation, he stated: 'Our goal is to achieve the Four Modernizations by the end of this century. Our concept differs from that of the West, so I'll use a new term, called Chinese-Style Four Modernizations' (Yan 2024).

## Initial Investigations into Chinese Modernization Studies

Modernization stands as a defining feature of contemporary global history and remains a focal point of inquiry within Chinese philosophical and social science research. Originating in Western countries during the mid-twentieth century, the classical theory of modernization – exemplified by US scholars – posits a unilinear transition from agrarian to industrial societies that connects industrial growth and democratization and frames the theory of modernization as universal history (Da Silva 2021; Fukuyama 1992; Lipset 1959). In reaction, intellectuals from Global South countries, most notably Samir Amin and his dependency framework, critiqued Western paradigms and proposed alternative models emphasizing structural inequality in the world economy (Martinelli 2005, 55–82). Western academic contributions to modernization research have generally synthesized theoretical insights from disciplines including history, economics, and political science. This has yielded a range of theoretically significant paradigms that hold considerable value for global modernization studies (Goorha 2010; Gwynne 2009). These paradigms have an inevitable Eurocentric bias, however – that is, they use Western political-cultural norms as the yardstick for all societies – which Global South nations now seek to transcend by reconceiving modernization on their own terms.

Modernization has long been a pivotal topic of discourse within Chinese philosophy, history, and political science. In the 1930s, the *Shenbao Monthly Journal* published a special issue titled 'China's Modernization Question', which focused on the pathways and conditions for China to achieve modernity (Chen and Wang 2024, 96–102). This represented the first systematic academic engagement with the concept of modernization in China's intellectual community; however, there was no consensus on the concept's definition, scope, or methods of realization, nor had a comprehensive theoretical framework yet been established.

Modernization research in China began in the mid-1980s with a focus on critically rethinking the revolutionary paradigm of development paths in latecomer nations. Scholars have vigorously debated the main thread of modern Chinese history (Jiang 1986; Shen 1987; Zhang 1984a, 1984b, 1987) and gradually moved beyond a one-dimensional framework of abstract timelines, phases, peaks, and events to explore the complex, often tortuous, process by which China emerged from medieval structures and transformed into a modern society. The seminal work by Luo Rongqu,[2] *A New Thesis on Modernization*, which analyzes modernization historically and includes Chinese and East Asian experiences, stands as a paradigmatic example of this scholarly evolution (Peng 2009). Chinese scholar Zan Tao (2023, 135) argues that one of Luo's most significant contributions was to distinguish studies of the global modernization process from Western 'modernization paradigms', while integrating the concept and framework of 'modernization' with China's own historical experience and practical conditions in an effort to Sinicize it (*Zhongguohua* 中国化).

[2]Luo Rongqu (August 29, 1927–April 4, 1996) was a renowned historian, professor, and doctoral supervisor at Peking University. He was a key pioneer in the study of contemporary Chinese modernization theory and comparative modernization processes. His major representative works include *A New Thesis on Modernization* and *Essays on the History of the Americas*.

*A New Thesis on Modernization* was guided by Marxist theory, and Luo pioneered research into a range of profound theoretical and historical questions concerning modern societal development, proposing the theory of 'one direction with multiple paths'[3] which transcended the previously dominant revolutionary paradigm while critically incorporating elements of the Western modernization paradigm. This constitutes a major theoretical breakthrough in Chinese academic approaches to the study of modernization. In its early stages, Chinese modernization theory shifted its focus toward analyzing the foundations of internal economic and social change; this moved beyond the established notion of class struggle as the primary driver of societal transformation. Instead, it positioned the development of productive forces as the fundamental impetus for social progress. This paradigmatic shift steered Chinese social science research toward a modernization framework that then shaped scholarly investigations into the diverse models and pathways of modernization in the countries of the Global South, including those in the Middle East.

The modernization turn in Chinese Middle East studies rests on three main pillars. *First*, modernization in the Middle East constitutes a paradigmatic component of the process of world modernization: the Middle East was the first region in the Global South to embark on the road to modernization, as evidenced by the mid-nineteenth-century Tanzimat reforms in the Ottoman Empire. Then, in the post-World War II era, newly independent Middle Eastern nation-states launched comprehensive modernization drives to close the gap between themselves and developed countries. Despite this, the region has remained one of the weakest links in the global modernization chain, as ethnic tensions, religious conflicts, social fragmentation, and geopolitical rivalries have profoundly constrained its development. *Second*, viewed through the prism of regional realities, modernization in the Middle East is highly distinctive. Modernization entails a holistic transformation of traditional societies, encompassing political, economic, military, social, religious, and cultural dimensions. In the Middle East, this process has been shaped by wars, political systems, oil economies, and religious factors, offering a vital lens for understanding the region's complex challenges and vividly illustrating its multifaceted trajectories of change. *Third*, from the Chinese perspective, modernization has long been the central thread of national development. Since the mid-nineteenth century, China has undergone four successive phases of modernization: early explorations of 'Chinese modernization' (from the middle of the nineteenth century to the 1940s), the 'Four Modernizations' campaign (from the founding of the People's Republic of China to the late 1970s), the 'moderately prosperous society' (from the early 1980s to 2020) drive, and the current goal of comprehensively building a 'socialist modern country' (since 2020) – each reflecting evolving conceptions of modernity within China's own historical experience (Zhang, Wang and Bi 2022, 42–51).

The report of the 20th National Congress of the Communist Party of China's in-depth articulation of 'Chinese-style modernization' as an original and emblematic concept within Chinese autonomous knowledge system exemplifies how the Chinese

[3]This theory, also translated as 'monistic multi-linear theory', measures social progress by production, not social or property structures, thus highlighting the impact of industrialization. It emphasizes that modernization follows multiple paths due to interacting factors (see Dong 2004, 6).

experience has been elevated into indigenous theory (Sun 2024). This concept represents a development paradigm with distinct Chinese characteristics that aims to offer key insights for developing countries seeking autonomous paths to modernization. The focus of Chinese scholars on Middle Eastern modernization aligns with China's keen interest in the developmental trajectories of developing nations, resonates with the long-standing principle of 'independent and self-reliant development', and complements the Chinese diplomatic doctrine of 'promoting peace through development' in addressing Middle Eastern hotspots (Sun and Zhang 2019, 122–128).

## The Nascent Phase of the Modernization Paradigm in Chinese Middle East Studies

In the 1980s, following the initiation of China's Reform and Opening Up, Chinese scholars began to focus on the theoretical study of modernization, the various trajectories – including initiatives and achievements – of modernization in developed countries, marking the formative stage of China's Middle East modernization studies. Research gradually became more organized, standardized, and professional. First, several research institutions were either reestablished or newly founded, including the Institute of West Asian and African Studies at the Chinese Academy of Social Sciences, the Institute of Asian and African Studies at Peking University, and the Institute of Middle Eastern Studies at Northwest University, thus forming a foundational framework for the field. Second, academic activities related to Middle East research became increasingly dynamic. In 1982, the Chinese Association of Middle East Studies was established in Kunming, Yunnan Province, and Chinese academia began to establish scholarly exchanges with foreign counterparts (Zhang and Li 2024, 10). Academic journals were also launched in the wake of the Reform and Opening Up, including *Arab World* (1978), *Middle East Materials and Translations* (1979), and *West Asia and Africa* (1980). Finally, more specialized personnel in the field were trained. Several Chinese universities, including Beijing Foreign Studies University and Shanghai International Studies University, resumed programs for cultivating professionals proficient in Middle Eastern languages, with Northwest University and Beijing Foreign Studies University taking the lead in admitting doctoral students. This provided a solid foundation for the development of researchers in the field. During this period, Chinese Middle East research primarily focused on the analysis of current affairs, the oil industry, and modern transformations. Influenced by the aftermath of the Cultural Revolution and the nascent stage of China's own modernization research paradigm, Chinese scholars' examinations of Middle Eastern issues exhibited characteristics of class analysis while also incorporating theoretical elements of the modernization paradigm.

The first category of research developed around the question of social change and conflict in the Middle East through the lens of modernization. During the 1980s, the region experienced multiple upheavals, beginning with the 1979 Iranian Islamic Revolution, followed by a broader Islamic resurgence across the Middle East, the shifting balance of US–Soviet interests during the Cold War, and the outbreak of the Iran–Iraq War (1980–1988). For instance, in his analysis of the Persian Gulf conflict,

Dong (1982, 1–8) suggested that the unrest in the Persian Gulf stemmed from both external and internal factors. Externally, competition between the US and the Soviet Union over regional interests had complicated the strategic landscape, while within the Middle East, social transformations had widened the gap between rich and poor and exposed the friction between Islamic traditions and industrial civilization, exacerbating failed modernization efforts. Tian (1982, 6–11) interpreted US policy toward the Middle East by examining the coherence, motivations, and various actors' stances concerning the peace plan proposed by the Reagan administration, which in practice served as a tool for exporting the US's own model of modernization. Regarding the Arab–Israeli conflict and Middle East peace negotiations, Guo (1986, 15–18) analyzed the protracted nature of diplomatic efforts and noted that while the pursuit of dialogue and political settlement represented the principal trajectory of regional developments, Israel's entrenched positions constituted the fundamental obstacle to peace. It was emphasized that any resolution to the Middle Eastern conflicts would require a prolonged and arduous struggle.

The 1979 Iranian Islamic Revolution had profound implications for Iran's societal transformation, regional dynamics, and the establishment of the Islamic Republic. It significantly influenced modernization trajectories in Iran and other Islamic countries. In the wake of the revolution, numerous Chinese scholars undertook analyses of this upheaval. Zhao (1981, 21–26) primarily examined the political dimensions of the Islamic Revolution, with a focus on the theocratic governance structure, its foundational basis and impact on economic development, adopting a pessimistic outlook regarding the revolution's prospects. Guo (1982, 2–10) analyzed the social underpinnings of the revolution, contending that its outbreak inflicted substantial harm on Iran's economic and social fabric as well as its international standing, also expressing skepticism about the revolution's future. Shen (1982, 2–10) approached the Islamic Revolution from the perspective of the Islamic revival movement and explored the catalysts behind the resurgence of Islam across Middle Eastern countries. The influence of this revival was also assessed in relation to two facets: internationally, it was posited that the Islamic revival played a positive role in anti-imperialist and anti-hegemonic struggles; domestically and regionally, it was argued that the revivalist movement exerted a negative impact on societal modernization.

The second category of Chinese scholarship in this period focused on the historical examination of early modernization efforts in Middle Eastern countries, particularly Israel, Iran, Turkey, Egypt, and the Gulf states. In the early stages of China's Reform and Opening Up, scholars concentrated on these nations' initial reform endeavors, colonial experiences, and anti-colonial and anti-imperialist struggles. Studies of modern Middle Eastern history have thus become a crucial component of Chinese research on regional modernization. Drawing upon a substantial collection of foreign-language materials in Arabic, English, Japanese, and Russian, the West Asia Research Office of the Institute of Asian and African Studies, Peking University (1985) analyzed the trajectory of Saudi Arabia's modernization across historical, political, economic, religious, and social dimensions. Yang (1990) adopted a comprehensive modernization paradigm to systematically analyze Turkey's development from World War I through the 1970s. His study encompassed political, military, diplomatic,

economic, and cultural dimensions to provide a holistic view of Turkey's modernization trajectory. By incorporating extensive empirical data, Yang's work laid a significant foundation for Turkish modernization studies within Chinese academia. Chinese scholars have also extensively examined the modernization initiatives led by prominent Middle Eastern figures such as Muḥammad ʿAlī in Egypt, Reza Shah in Iran, and Mustafa Kemal Atatürk in Turkey. These studies analyzed the nature and impact of reforms, while offering comparative perspectives and critical evaluations. For example, Peng (1988, 5–12) conducted a comprehensive study of Reza Shah's reforms during the Pahlavi dynasty and highlighted their significant contributions to Iran's modernization. Muḥammad ʿAlī's reforms were compared with early modernization efforts in other Middle Eastern countries, such as those of Atatürk in Turkey, summarizing their successes and failures.

This comparative approach led to the development of a framework for analyzing modernization in the three upper-tier Middle Eastern countries – Turkey, Iran, and Afghanistan – during the period of the two world wars. Yang (1980, 49–58) focused on the economic aspects of Muḥammad ʿAlī's reforms and employed two primary analytical perspectives to do so. First, from a historical-materialist viewpoint, the effectiveness of modernization reforms was assessed based on the forms of ownership of the means of production. Accordingly, it was argued that Muḥammad ʿAlī's modernization efforts were feudal rather than capitalist in nature, thus representing an early and embryonic exploration of modernization. Second, using class analysis, the limitations of Muḥammad ʿAlī's reforms were examined, contending that they served the interests of the exploiting class, ultimately leading to their failure.

In contrast, while also employing class analysis in his discussion of Muḥammad ʿAlī's reforms, Lu (1979, 72–79) adopted a more affirmative stance toward his modernization endeavors in Egypt. It was argued that a significant reason for the failure of these reforms was the intervention of British colonialism. In the analysis of the Turkish revolution, Ma (1984, 22–31) discussed the anti-imperialist and anti-feudal revolutionary paradigm, emphasizing the dual nature of the Turkish bourgeois revolution and argued that the modernization advocated by Atatürk was a wholly Westernized model lacking local characteristics. This critique reflected the ongoing debates about the cultural and political implications of adopting Western models of development in non-Western contexts, a theme that was central to discussions of modernity and identity in the Middle East (Keddie 1981).

## The Accelerated Growth of the Modernization Paradigm in Chinese Middle East Studies

Since the late 1990s, modernization studies conducted by Chinese scholars have entered a 'Hundred Flowers Blooming' (Wang and Wang 2021, 143) era characterized by an equal emphasis on theoretical and applied studies. It entailed a greatly expanded scope, and range of inquiry and approaches that are rooted in local contexts while still remaining attentive to global perspectives. Unlike Western (and particularly US) modernization research – which often focuses on 'the other', judges so-called 'backward' countries by external standards, and retains strong ideological

overtones – Chinese modernization studies and theoretical constructs stem from reflections on China's own modernization practices, while also placing significant emphasis on drawing lessons and experiences from 'others' to inform solutions for China's real-world developmental challenges. The modernization paradigm had gained widespread acceptance among Chinese scholars, and this profoundly influenced the trajectory of Middle East studies in China. This shift led to significant advances in the degree of specialization, systematization, and theoretical depth to Chinese research, which manifested in three primary dimensions.

First, access to diverse research materials was enhanced. The 1990s saw Chinese scholars gaining improved access to a wide array of research materials. Increased international collaboration enabled direct engagement with Middle Eastern sources and firsthand data collection, which significantly enriched the empirical foundation of the field in China. Second, interdisciplinary methodologies were adopted. In reflecting on the limitations of pre-reform historiographical approaches, Chinese scholars advocated for aligning historical research with societal transformations, and this led to the adoption of the modernization paradigm (Yu 1994, 8). This paradigm shift encouraged the incorporation of methodologies from political science, economics, sociology, and other disciplines into the study of Middle Eastern modernization. The result was a more multidimensional and interdisciplinary analytical framework that provided nuanced insights into the complexities of modernization processes in the region. Third, the field saw greater synthesis with Marxist historical materialism. Chinese scholars emphasized the integration of modernization theory with Marxist developmental perspectives, thus aligning Middle Eastern modernization studies with the broader discourse of China's reform-era ideological shifts. For instance, Yan's (1993, 546) analysis of urbanization in the Middle East underscored the necessity of contextualizing modernization efforts within the specific historical, cultural, demographic, ecological, and economic conditions of each country. The findings cautioned against uncritically emulating Western models or the experiences of other developing nations and instead advocated for tailored approaches that considered the unique circumstances of individual nations. Collectively, these developments strengthened Chinese scholarship on Middle Eastern modernization, which was now characterized by enriched empirical resources, methodological pluralism, and theoretical innovation grounded in indigenous intellectual traditions.

Unlike the revolutionary paradigm, which often portrayed empires and monarchies as symbols of backwardness, the modernization paradigm offers a more nuanced evaluation of early reform efforts in the Middle East. This approach emphasizes the progressive aspects of modernization and the agency of local actors. For instance, scholars have analyzed the reforms of the Qajar dynasty in Iran and compared them with subsequent modernization efforts, thus highlighting both achievements and shortcomings (Feng and Huang 2019, 80–86; Jiang and Guo 2023, 92–107). This shift reflects a broader trend in Chinese scholarship since the 1990s, where modernization has become a central framework for examining political reforms, economic development, and cultural integration in the Middle East.

The first strand of research examined the early developmental trajectories of Middle Eastern countries. By the turn of the twenty-first century, Chinese scholars

began to reinterpret Middle Eastern issues through the lens of modernization, with a particular focus on significant historical events such as early reforms, revolutions, Islamic revival, and nation-state formation. This approach moved beyond the revolutionary paradigm and class analysis to focus on internal transformative factors within Middle Eastern nations. Early studies concentrated on the Ottoman Empire and Turkey's Kemalist reforms. For example, Peng (1987, 7) systematically analyzed Kemalism and highlighted its fusion of modernization and anti-imperialist nationalism as a comprehensive secularization effort. In contrast, research on Ottoman reforms often assessed their successes and failures. Scholars like Liu (2008, 100–105), Wang (2008, 51–55), and Tian (2014, 167–173) examined political, economic, and cultural modernization aspects of the Ottoman Empire. Scholars also applied modernization theories to assess the effectiveness of Muḥammad ʿAlī's reforms in Egypt. For example, Wang (1997, 43–47) critiqued the reforms as mere imitations of Western models that were unsuitable for Egypt's context, thus leading to slow modernization. Che (2003, 135–139) employed the impact-response model[4] and suggested that the reforms were insufficiently thorough, as they retained pre-modern structures that hindered Egypt's modernization trajectory.

Other scholars shifted their focus to Iran. Qian (1998, 13) critically examined the reasons for the failure of Iran's modernization. It was proposed that the failure of the Pahlavi modernization stemmed from equating modernization solely with industrialization. This perspective further deepened the concept of modernization. Following the publication of his 2001 article, 'From the White Revolution to the Islamic Revolution: The Historical Trajectory of Iranian Modernization' (Ha 2001, 134–143), Ha began to conceptualize a theory of modernization. In 2006, *The Modernization Process of Middle Eastern Countries* was published; it used major Middle Eastern nations as case studies to analyze the multifaceted contradictions within the context of the historical patterns of modernization in the region. The above work situated Middle Eastern modernization within a global context, not merely assessing it through the lens of Westernization, but also recognizing Islamic traditional civilization as a fundamental factor distinguishing modernization in the Middle East from processes in other regions. By comparing the paths toward modernization of various Middle Eastern countries, Ha highlighted both the commonalities and unique characteristics of such changes in the region.

In the 1970s, a widespread Islamic revival movement emerged across the Middle East that aimed for an Islamic Path of Development. For example, Liu (1999, 8) argued that Middle Eastern modernization cannot be detached from the Islamic framework; the profound influence of Islamic culture must be acknowledged. Thus, the path to modernization lies in achieving mutual coordination and adaptation between modernization and Islamic traditions. Yao (2001, 7–11) further contended

[4]During the 1950s and 1960s, the impact-response model gained significant traction among scholars from the US and other Western nations. Among its proponents, the US historian John King Fairbank was particularly influential. Fairbank posited that the essence of modern China's transformation was a process interwoven with external shocks and indigenous responses. This interpretive framework not only applied to China but also provided a methodological lens for examining the modernization trajectories of other non-Western societies. Fairbank's work, notably *China's Response to the West*, was instrumental in disseminating this model and suggested that China's modern history could best be understood as a series of reactions to Western influences (Têng and Fairbank 1979).

that the Islamic revival was a rejection of Western-style modernization while also possessing certain characteristics compatible with Middle Eastern modernization. The contemporary Middle Eastern Islamic revival was thus an attempt to explore a path to modernization with Islamic characteristics, opposing complete Westernization.

Some studies have also systematically examined the relationship between Middle Eastern modernization and Islam (Xiao 1997, 3). Peng (1977) analyzed the unique Islamic factors in the Middle East from a modernization perspective and emphasized that understanding these factors is essential for comprehending the complex characteristics of modernization in Middle Eastern countries. This modernization was classified into three major stages that differ from traditional divisions of Middle Eastern history and Islamic history, while accurately reflecting the development of a form of modernization that includes Islamic elements. Peng discussed whether modernization necessitates the sacrifice of traditional Islam. Starting from a historical materialist perspective, the relationship between Islam and Middle Eastern modernization was examined, as a transformation from traditional to modern society that transcends the cultural–historical approach under the paradigm of an East–West cultural conflict.

The second focus pertains to the interpretation of revolution and state-building in the Middle East as a form of modernization. Revolution and state-building are classic topics in Chinese Middle Eastern studies, and modernization has provided a critical lens for understanding these phenomena. In his analysis of the Pahlavi regime's White Revolution in Iran, Yang (1999, 31–35) emphasized the importance of social stability, particularly during the middle phase of modernization movements. It was argued that the fundamental cause of the White Revolution's failure lay in the disruption of the social and cultural structure. Yang's focus extended beyond the technical and economic aspects of modernization to encompass social and cultural elements, suggesting that human modernization was the key determinant of success or failure. In comparing Khomeini's Islamic Revolution with the Pahlavi White Revolution, Yang highlighted the relative social stability preceding the Islamic Revolution as crucial. In the analysis of the Iranian Islamic Revolution, Liu (1990, 44–51) also underscored the issue of a unique modernization path – that is, whether Islamic modernization could be realized. Liu noted that while Western modernization aimed for secularization, Iran's Islamic ideologies, including fundamentalism and Islamic governance, could potentially contribute to modernization if creatively transformed in terms of values, social politics, and cultural psychology. Liu, like Yang, approached the developmental issue in modernization from the perspectives of cultural psychology and ideology, thus offering a deeper interpretation of the Islamic Revolution.

In his exploration of state formation in Middle Eastern countries, Huang (1996, 7) emphasized the interplay between religion and politics and their interaction with modernization. It was posited that the relative strength of religious and political forces significantly influences postindependence political, economic, and social modernization. Zhang (2009, 46–51) argued that the Middle East is characterized by a pluralistic cultural landscape. Consequently, Middle Eastern states address intercultural conflicts in various ways, notably through coercive unification (forcefully forming a unified nation), compromise (peaceful coexistence of multiple cultures), and differentiated treatment (unequal treatment of culturally disparate groups). These

cultural conflicts have the potential to erode national cohesion and stability. The challenge lies in how Middle Eastern countries manage intercultural relations, which poses a significant test for their modernization efforts. This analysis resonates with broader discussions on the complexities of nation-building in culturally diverse societies where competing identities often undermine state stability (Smith 2000).

Since the 1990s, Chinese scholars began to shift their focus in Middle Eastern modernization studies from political and economic dimensions to encompass social, cultural, and psychological aspects. This shift also led to a greater emphasis on the internal and adaptive qualities of reforms that highlighted the necessity for policies to align with the specific conditions in a nation. This approach reflected a pragmatic orientation that aligned with China's own reform context during that period.

Chinese scholars' sustained interest in modernization has led to a parallel focus on theoretical questions of modernity itself. From the perspective of academic historiography, Zan (2007, 376–409) mapped three successive paradigms in Turkish modern historiography, which has evolved from revolutionary historiography to modernization research, finally progressing to postmodern approaches. Zan mounted a vigorous critique of the postmodern turn and argued that ideological commitments exert a profound influence on historical scholarship. By juxtaposing foreign research on Turkey's modern history with China's own modernization studies, theoretical understandings of modernity are enriched. This reflection on Turkey's modernization trajectory characterizes it as 'guided modernity' (Zan 2009, 64–73). At a theoretical level, it was contended that the elite-driven, state-supervised model must evolve, and that contemporary challenges compel Turkey to rethink its path and progressively embrace a more pluralistic model.

Chinese scholarship on Middle Eastern modernization theory also manifested in the publication of several weighty, theoretically driven works during this period. After delineating the concept of political modernization and tracing its trajectory in the Middle East, Chen (2000) conducted in-depth analyses of the region's principal political ideologies and defining characteristics, as well as Islam's influence on political modernization. The second volume then examines political modernization in individual Middle Eastern states and offers a comprehensive synthesis of regional trends. Bi (2005) produced the first systematic study of Egypt's modernization and political stability, which highlighted political institutions as the bedrock of stability, religious forces as catalysts for political mobilization and potential destabilization, and economic and social factors as foundational to enduring order. Under Wang's (2015) editorship, *The Course of World Modernization: Middle East Volume* surveyed the major Middle Eastern states and identified three high-growth phases of regional modernization; it also delivered a nuanced critique of its nature, distinctive features, and inherent limitations. Feng (2009) examined Middle Eastern modernization from a globalist perspective by analyzing its increasing openness and interaction with the world economy, conducting a comprehensive assessment both vertically across historical periods and horizontally across individual countries, and incorporating factors such as technology, oil and state intervention, nationalism, warfare, and religion into their study.

Concurrently, Chinese scholars have advanced theoretical frameworks with distinct Chinese characteristics through their reflections on Middle Eastern modernization. Drawing on both historical and contemporary Middle Eastern contexts, Peng (2002) proposed a theory of profound significance within Chinese academia: civilizational exchange theory (*WenmingJiaoWanglun* 文明交往论). This theory conceptualizes Middle Eastern modernization as a deepening of interactions between Eastern and Western civilizations in the region. This approach underscores that Chinese scholars, when examining Middle Eastern modernization, not only focus on internal dynamics and interconnections within the Middle East but also emphasize the complex interplay and convergence of multiple factors across different regions. This perspective aligns with global scholarly efforts to understand modernization as a process shaped by cross-cultural exchanges and hybridity that challenge Eurocentric models of development.

## New Developments in Chinese Research since the Arab Upheavals

Since the 18th National Congress of the Communist Party of China in 2012, Chinese political and academic circles have turned their focus to 'Chinese-style modernization', striving to construct an indigenous theoretical framework. In his report to the 20th Party Congress, Xi Jinping systematically defined this concept according to five principles: a vast population base, common prosperity for all, the harmonious integration of material and spiritual civilizations, a symbiotic relationship between humanity and nature, and adherence to a path of peaceful development (Xi 2022). This articulation goes beyond the long-dominant Western theories of modernization and enriches the global corpus of thought with distinctly Chinese insights. Chinese-style modernization forges a new pathway for world modernity that is guided by Marxism, oriented toward socialism, centered on the people, committed to independence and peaceful development, and dedicated to building a shared community of human civilization. It writes a new chapter in modernization theory for developing nations seeking the correct route and means to reshape the world order, and it envisions a new form of civilization: a prosperous, democratic, civilized, harmonious, and beautiful socialist modern power (Wang 2025, 7–8). Chinese Middle East modernization studies have entered a new developmental phase rooted in the Chinese domestic context and oriented toward the practical challenges of development in the Middle East.

This new phase has been marked by a shift toward a content-driven approach focused on specific issues (Redianwenti 热点问题; Gong 2016, 4–15; Liu 2011, 42–52): Chinese studies of modernization now focus on specific post-uprising challenges, including political transition, state governance, and social equality. At the same time, Chinese scholars have continued to pursue more traditional inquiries directly framed by the modernization paradigm, notably historical examinations of the modernization trajectories in Iran, Turkey, and Egypt. This dual orientation – toward both pressing contemporary problems and the longer-term modernization experience of individual states – has defined the current contours of China's engagement with Middle Eastern modernity.

The first category of research encompasses examinations of the Arab upheavals, which represent the largest wave of regional unrest – or 'color revolutions' – to erupt globally in the twenty-first century; the effects of this unrest continue to reverberate today. While Chinese academia commonly uses the term 'Arab upheavals' (*Alabojubian* 阿拉伯剧变) to describe the regime changes that began in the Arab world in 2010, Chinese scholars view these upheavals as'color revolutions' – that is, nonviolent, ideology-driven movements for regime change that swept through Central Asia, the former Soviet Union, and Eastern European countries from the late twentieth century. In this regard, Chinese scholars generally regard the US as the principal instigator and promoter of these 'color revolutions'. Over an extended period, a series of studies were produced on this unrest in the Middle East. In a historiographical assessment, Fan (2013, 146–157) noted that, after the uprisings, whereas US scholarship maintained a constant engagement with Middle Eastern affairs, Middle East research had previously been a neglected field in China's mainstream journals on international relations, but the volume of Chinese publications on the region rose sharply after the uprising. After the outbreak of the Arab upheaval, Chinese scholars probed this transformation from multiple angles to analyze its causes, processes, and impacts.

It has been widely argued that the underlying essence of the Middle East transformations was a concentrated eruption of various contradictions inherent in the path toward modernization. Tian (2018, 48–67) analyzed post-uprising political transformations in the Middle East by diagnosing a trend of 'soft authoritarianism' (*Ruanzhengquanhua* 软政权化) and argued that continual Western criticism of the region's political modernization plunged its governance into disarray. It was further suggested that wholesale Westernization cannot be a viable path for the region; what is needed instead is an indigenous, context-sensitive developmental trajectory. Li (2011, 4–5) located their root cause in an endemic 'Arab malaise' – that is, a cumulative explosion of contradictions born of stagnation within Arab societies themselves – and called for serious self-reflection on national developmental models. Huang (2016, 223–241) offered a summarizing critique of the uprisings' aftermath and suggested that rather than improving the region's prospects, the so-called 'Arab Spring' intensified local conflicts – morphing into an 'Arab Winter'. From a state-building perspective, these uprisings revealed the deep deficiencies in the construction of modern nation-states that underlie the region's persistent turbulence. Bao (2016, 60–76) examined shifts in popular perceptions across social strata – moving from initial euphoria to sober reassessment – and argued that this cycle of hope and disillusionment reflected both the practical failures of the uprisings and the inadequacies of domestic discursive frameworks. It was suggested that genuine progress would require Arabs to critically rethink their own developmental and transitional challenges. Marking the tenth anniversary of the Arab upheavals, Tian (2021, 3–17) repudiated the notion that toppling authoritarian regimes alone can resolve systemic crises – viewing this belief as the product of prolonged Western ideological penetration – and, from a class-analysis standpoint, advocated for replacing bourgeois rule with proletarian-peasant governance to chart a more fitting path forward. Liu (2021, 33–55) explored how Islamism, military intervention, and identity politics have each shaped both the

Arab upheavals and broader modernization processes to demonstrate that these forces interact with modernity in ways that are at once compatible and in tension.

A close examination reveals that Chinese scholars' analyses of the Arab upheavals have avoided the intellectual trap of Western academic discourse; that is, it is not simply assumed that regime change and so-called democratization automatically leads to prosperity. On the contrary, scholars have generally located the primary causes of these upheavals in the deep-seated dilemmas of internal modernization in Middle Eastern states. Overall, studies argue that the complexity of this transformative process requires breaking long-standing dependencies on the West, while strengthening strategic autonomy to address political, economic, and social challenges more effectively and thus advance the region's modernization. It is noteworthy that, since the Arab upheavals, Chinese scholars have also begun to adopt a modernization perspective in their study of the Israeli–Palestinian conflict. Yin (2023, 47–50), Wang (2024), and others contend that the conflict's essence lies in the perpetuation of a colonial economic structure, stressing that the core of the Palestinian question is the 'right to development'. They argue that Israel's policy of blockade has precipitated the collapse of Gaza's infrastructure and driven its unemployment rate above 70%, thereby preventing Palestine from achieving economic autonomy through industrialization.

The second category encompasses research on the involvement of the so-called great powers in Middle Eastern security and developmental governance. The modernization efforts of Middle Eastern states have been inextricably linked to the engagement of external actors. Since the Arab upheavals, Chinese scholarship has produced numerous studies reflecting on the roles of outside powers in regional security and governance. Scholars such as Sun (2012, 31–44), Tang (2018, 27–47), Liu and Chen (2022, 20–42), and Peng (2022, 547) have argued that, despite the US's concerted efforts to maintain its leadership in the Middle East after the uprisings, the transition from a unipolar to a multipolar order in the region is now irreversible. Over the past decade, as the US has undertaken a strategic retrenchment in the Middle East, countries like China, Russia, France, Germany, and India have each deepened their participation in the region's affairs. In comparative analyses of China's engagement versus that of other powers – particularly Western states – Chinese scholars contend that China has sought to 'promote peace through development', thereby advancing Middle Eastern modernization, whereas other Western great powers have sought to pursue peace 'through the projection of power' or 'through the promotion of democracy' (Sun and Zhang 2019, 109–129).

Some Chinese scholars have argued that Russia's involvement in the Middle East also embodies the principle of 'promoting peace through development' and emphasizing political, military, economic, and diplomatic means to address regional challenges. For example, Bi (2016, 60–81) observed that Russia's deployment of military forces in Syria was motivated by a desire to 'leverage' the region's geostrategic balance, thereby consolidating Moscow's strategic presence in the Middle East. From a holistic perspective on the regional order, Tang (2020, 1–18) suggested that Middle Eastern states' turn toward Russia signals a new power configuration of 'American retreat and Russian advance'. Moscow's cooperation with regional governments in nuclear energy and trade was highlighted as evidence of its growing influence on Middle Eastern

development. In an analysis of Russia's economic relations with the region, Wei (2020, 3–22) noted that Kremlin diplomacy has prioritized energy partnerships, thus reflecting a strongly realist approach. Wang (2015, 395) noted that the absence of a 'core state' capable of providing leadership and stability has compelled Middle Eastern countries to rely on intervention by major powers and the international community when resolving significant regional issues, and this has formed a perennial obstacle to the region's modernization.

Scholarly discussions on China's involvement in Middle Eastern affairs are inextricably linked to the Belt and Road Initiative. Since 2013, President Xi Jinping has put forward multiple proposals to address the 'difficulties' facing developing countries. These proposals have been grounded in Chinese principles, solutions, and methods, and emphasized peace, innovation, leadership, governance, and integration. Beyond the Belt and Road Initiative, these include the Global Security Initiative, the Global Development Initiative, and the Global Civilization Initiative. All these schemes are presented as international public goods offered by China that reflect its commitment to an inclusive, 'benefit-for-all' model of development. Chen (2016, 32–48) analyzed Saudi Arabia's economic policy shift around 2014 and argued that Riyadh's reforms positively facilitate the implementation of the Belt and Road Initiative in the Middle East and that China should seize this window of Saudi transformation to deepen strategic dialogue. Tian (2016, 127–145) provided an in-depth examination of the opportunities for reshaping the international economic order afforded by the Belt and Road and emphasized that its impact extends beyond hard infrastructure to the construction of new institutional frameworks – thereby creating a robust platform for China–Middle Eastern co-development. China's relative disadvantages in the region were also noted, in addition to advocating for a calibrated, phased approach. Concurrently, Chinese scholars have undertaken focused country studies of Belt and Road participants – such as the comprehensive country-report series published by the China Social Sciences Press – thereby strengthening China's regional and country studies, tracing the evolution of China–Middle East economic and trade relations, and offering fresh perspectives on pathways to modernization in the Middle East.

China's engagement in Middle Eastern security and conflict management has also yielded significant results in recent years. For example, Fan (2023, 92–98) examined China's mediation of the Saudi–Iran dispute and argued that this case vividly demonstrated China's commitment to implementing the Global Security Initiative. Niu and Li (2023, 38–54) offered positive assessments of China's facilitation of the restoration of diplomatic relations between Saudi Arabia and Iran. It was suggested that this rapprochement has exerted a constructive influence on both the Middle East and China's own path to modernization – and arguably constituted the most consequential historical transformation in the formation of modern Middle Eastern nation-states. This perspective aligns with scholarly analyses of China's growing role in fostering alternative frameworks for regional stability and development that challenge traditional Western-dominated approaches to conflict resolution.

In sum, following the Arab upheavals, Middle Eastern states have encountered new historical opportunities and tasks on their path toward modernization. They face the

dual challenge of navigating the political turbulence induced by political transitions while simultaneously leveraging the developmental opportunities presented by global economic shifts. In the aftermath of these transformations, Chinese scholars have primarily focused on the transformations themselves, the resultant debates over developmental paths, the involvement of extraregional great powers, and energy issues.

In recent years, academia has reinterpreted and reevaluated significant historical modernization reforms in the Middle East against the backdrop of critical reflection and research on Chinese-style modernization. These efforts have aimed to synthesize a distinct Middle Eastern modernization path. Since 2015, Chinese academia has published two important monographs on modernization studies – one focused on Iran (Ji 2015) and the other on Jordan (Li 2021). At the same time, leading Chinese humanities and social science journals (i.e. *Historical Research*, *World History*, and *West Asia and Africa*) have devoted multiple special issues to modernization in Global South countries, including those of the Middle East (Han and Ma 2024, 31–55; Wang 2025, 21–28; Wang and Yan 2023, 43–57; Xie and Han 2023, 60–81). This top-down emphasis on modernization appears designed to demonstrate that, like China's own path, the modernization of nations in the Global South should be pursued in accordance with their unique developmental characteristics rather than through wholesale imitation of Western models. This trend also reflects the broader contest over Global South narratives between China and the US amid their current great-power rivalry.

## Conclusion

Chinese scholarship on the study of modernization has evolved from an early emphasis on Western Europe and the US to a more balanced focus encompassing both Western and developing countries. As the first non-Western region to attract sustained attention from Chinese researchers, the Middle East has yielded a particularly rich body of work on developmental trajectories. A systematic review of China's research on Middle Eastern modernization after the Reform and Opening Up thus not only provides a retrospective on China's area studies but also a paradigmatic synthesis of Chinese knowledge production on the Global South. Over the course of 40 years, this scholarship has achieved notable successes even as important gaps and challenges remain.

The first major contribution has been the articulation of a new research paradigm for Middle Eastern studies. Modernization provides both the subject of inquiry and the organizing framework. Chinese scholarship on the Middle East has thus foregrounded 'modernization' itself as its core paradigm. A defining feature of this work that emerged after the 1990s has been the shift from a revolutionary paradigm to a modernization paradigm. This new paradigm is rooted in Chinese theoretical principles and the specific realities of the region, thus combining a progressive conception of history with a materialist perspective. Although the Ottoman Empire's early modernization experiments from the late eighteenth century onward yielded some successes, the region's overall progress remained stalled. The modernization paradigm identifies three principal constraints: (1) the long-standing imposition of Western

models and 'Westernization', which clashed with local conditions; (2) great-power and regional geopolitical rivalries that fragmented the Middle East and diverted attention from development; and (3) the inhibiting influence of traditional forces – tribes, religious authorities, minority groups, and the military – that repeatedly stalled reform (Wang and Yan 2023, 43–57). Accordingly, the paradigm proposes that Middle Eastern states undertake comprehensive modernization reforms predicated on *strategic autonomy*, thereby forging developmental paths tailored to their own circumstances.

Furthermore, the research scope in this field has continuously expanded, and research perspectives have progressively diversified since 1978. Initially centered on major powers such as Egypt, Turkey, and Iran, research has branched out to cover additional cases – Jordan, Libya, Morocco, Saudi Arabia, and others – to reveal the region's varied pathways to modernity. Concomitantly, scholars have adopted increasingly pluralistic lenses: beyond traditional political and economic analyses, studies now integrate cultural, social, religious, ethnic, and linguistic dimensions to construct a multidimensional account of Middle Eastern modernization. Over the past decade, fieldwork and firsthand data collection have emerged as defining features of Chinese research. They have broken away from earlier reliance solely on Western-language literature and enabled a perspective that views the Middle East from within. Such on-the-ground engagement not only reinforces scholarly rigor but also affords more authentic, experience-based insights into the processes and lived realities of modernization.

Despite these advances, China's research on Middle Eastern modernization remains insufficiently systematic. Modernization is a vital dimension for understanding the trajectories of developing countries and therefore warrants sustained, comprehensive study – despite longstanding skepticism regarding its Western origins. As Huang (2006, 83) has noted, 'Although the concept of modernization has many flaws, it nonetheless highlights a major global developmental trend since the modern era'.

Currently, this field faces several challenges in China. First, an overemphasis on 'hot' topics has led to an uneven distribution of research focus, with some important countries and issues receiving only sporadic attention. Second, unclear disciplinary boundaries have undermined the scientific rigor of the field. Third, the range of research themes remains narrow, which has left many domains unexplored. Fourth, a heavy reliance on Western scholarship has made it difficult to produce high-quality, original analyses of Middle Eastern modernization. Finally, linguistic barriers – especially the limited use of Arabic, Persian, and Kurdish – have constrained the 'groundedness' of Chinese research in local contexts. These difficulties parallel wider scholarly conversations in the West advocating for the decolonization and localization of modernization studies (as *Middle East Critique* also aims to advance, see Capasso 2024, 2025), thereby enhancing their capacity to mirror regional contexts more effectively.

In sum, after nearly 50 years of development since the Reform and Opening Up, Chinese Middle Eastern studies have entered a phase centered on the modernization paradigm that is defined by a core focus on the modernization trajectories of the region and individual states in the region. The evolution of Chinese research on

Middle Eastern modernization not only epitomizes the broader production of knowledge on the region in China but also reflects a paradigmatic shift in China's regional and country studies.

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