Theorizing Region: Links to Ethnicity, Nation, and Race

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Abstract
The concept of “region” is widespread in the social sciences but rarely theorized. I argue here that region is a multivalent concept similar to ethnicity, nation, and race. Building on the work of Bourdieu, Brubaker, and Griswold, I show that all four concepts can be understood as both “categories of analysis” and “categories of practice.” Moreover, all four have fundamental similarities regarding (1) ontology and relation to space; (2) historical sequences and relation to time; and (3) protean boundaries that may change with social scientists’ research questions. Among the payoffs to this approach are improved precision and appropriateness of regional boundaries when social scientists use regions as independent or control variables and greater appreciation for how regions, as categories of practice, are made over time.

Keywords
comparative sociology, regions, historical sociology, race, nation

Given the work that the concept of “region” does in sociology and other social sciences, it remains undertheorized and “a theoretical lacuna” (Mann and Riley 2006:87). This is a problem because lack of attention to the meaning of regularly used concepts may lead to confusion regarding study results. If scholars use “region” in a vague or unspecified manner—whether it be for case selection; as an independent, control, or dependent variable; or even as a simple descriptive for social action—then the interpretation of any findings may be problematic.

Inspired by Swedberg’s (2017:196) implicit call for research on the “nature of concepts and how these should be used in actual research,” I argue that we can develop the region concept if we avoid analyzing it in isolation (studying in isolation implies it is unique), and instead compare it to three other concepts—ethnicity, nation, and race. More specifically, I argue that region, like ethnicity, nation, and race, is a multivalent concept. I focus on two meanings here: “region” is a folk category that people use in the social world (including as an administrative category in formal institutions) and an analytic category that social scientists use to understand the social world. Put another way, region is a category of practice and

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a category of analysis (Bourdieu 1987, 1991), and exploring both can yield important insights into the meaning and utility of the region concept. By comparing region with ethnicity, nation, and race, we see how all are concepts that categorize people.

In this article, I first briefly explore how social scientists have used and defined region, focusing on use of region in general interest sociology journals and the work of cultural sociologist Wendy Griswold. Second, I show what it means to say that region is a multivalent concept by exploring the related concepts of ethnicity, nation, and race primarily through the work of Pierre Bourdieu and Rogers Brubaker. Third, I look more deeply into the nature of the region concept, and I show similarities with ethnicity, nation, and race on three key dimensions: the lack of ontological status to the “group” of people denoted by the concept and their relationship to space; the centrality of time and historical sequences to category coherence; and the ways all four concepts have protean boundaries that may change with social scientists’ research questions. I close with takeaways for social science theory and methods, and I propose key areas for an agenda for the theoretical exploration of regions.

WHAT DO SOCIAL SCIENTISTS MEAN WHEN THEY USE “REGION” IN RESEARCH?

Since the founding of the field of sociology, researchers have commonly used the concept of “region.” Outside the field of human geography, however, sustained attention to what regions are—even simple definitions—and how they matter are very rare.

The word “region” comes from Latin, *regio* (“direction” or “district”), by way of the Old French *regere*, meaning “to govern” (Cooke and Leydesdorff 2006). However, most contemporary social science uses of region distinguish the concept from legal jurisdictions that have their own governments (e.g., cities, provinces, countries). The people whom contemporary social scientists understand to be in a region may have some formal, institutionalized organization, but whether in sub- or supranational classifications, they will rarely participate in a full set of governing structures with a monopoly on the legitimate use of force, systems for taxation, social security, and so on.

This understanding can be seen in the earliest uses of the region concept in sociology. For example, Weber ([1930] 2005) contrasted West and East as regions (or Occident and Orient) when he sought to explain the rise of rationalism, and regional strategies have been standard in social science research on modernization and development ever since (e.g., studies of the economic rise of East Asia; Vogel 1993). Studies of development in other social sciences, such as political science, use the region concept similarly, focusing on regions such as “East Asia,” “Eastern Europe,” and “Latin America” (Haggard and Kaufman 2008; Przeworski 1991). Social scientists also commonly invoke subnational regions in the study of politics—consider the long-standing interest in the American “South” (Key 1949) or metropolitan regions (Saxenian 1994). Less frequently, scholars examine regions when formalized as institutions, especially for trade or security.

It is difficult in a short space to comprehensively characterize how social scientists use the region concept, but it is possible to make some introductory generalizations about the field of sociology with examples. *Sociological Theory* has not published an exploration of the region concept, but a review of the ways region is used in sociology in the past three years, focusing on articles in leading, general-interest journals (*American Sociological Review, American Journal of Sociology*) and in the past few decades of *Annual Review of Sociology*, shows the most common use of the region concept is as a control or independent variable that authors do not define or explain. This approach is common in regression analyses (e.g., Flores and Schachter 2018; Gorman and Seguin 2018; Wilmers 2017) and
interview studies (e.g., Childress and Nault 2018). Researchers may use “off-the-shelf” regional categorizations (i.e., constructed by others, such as the Census Bureau) as independent or control variables or to define comparative cases without interrogating what these particular boundaries might mean for the study (e.g., Logan et al. 2018; Horowitz 2018).

Parigi and Bergemann’s (2016) analysis of voting patterns stands out as an effort to explain regional boundaries. Although the authors do not define what they mean by the regions in their study, in a footnote they explain that they classified some non-Confederate states as in the “South” because “prior to the war, they had more economic and cultural similarities with the South than with the North” (Parigi and Bergemann 2016:517n8). However, the authors do not explain what these similarities were or why they mattered (and not others) in constituting regional membership.

The lack of justification and explanation for regional boundaries in these studies follows the strategy of articles in the Annual Review of Sociology, a journal devoted to defining the field’s central questions and state of knowledge. These articles also avoid theoretical exploration of the region concept. This is true even when “region” would seem relevant to the topic. Logan’s (2012) searching inquiry into “spatial thinking in social science” uses the term “region” repeatedly without defining it. The same is true of Gieryn’s (2000) otherwise insightful review essay, playfully titled “A Space for Place in Sociology.” A review essay on “Regional Paths of Development,” focusing on “four major third world regions,” lists “Latin America, East Asia, South Asia, and sub-Saharan Africa” (Gereffi and Fonda 1992:421). The study lists the countries included in each region only in a footnote to a table. The boundaries are thus described, but there is no explanation for inclusion or exclusion. For instance, “Sub-Saharan Africa refers to all countries south of the Sahara except South Africa” and “East Asia refers to all the low- and middle-income economies of East & Southeast Asia and the Pacific, east of and including China and Thailand” (Gereffi and Fonda 1992:428, Table 1).

None of the preceding is intended as a critique of this research. That these authors do not define region is not surprising given that defining the concept is not as straightforward as common usage implies. A recent effort to explore the concept from the perspective of the sociology of development (Tickamyer and Patel-Campillo 2016:304) contains a section, “What Is a Region?,” that does not define the term, but instead shows a multiplicity of understandings and argues that the region of Appalachia “provides the quintessential example of virtually every aspect of what makes the term region so problematic.”

The region concept has mostly escaped sustained theoretical attention, but important work by Wendy Griswold explores region and related concepts from the perspective of cultural sociology. In her study of regional literatures and the reading public, Griswold (2008) goes far toward developing the concepts of space (emptiness, where things happen and “take place” [p. 5]), place (“human accomplishment,” “socially produced and socially productive” in that it can influence behaviors, thoughts, and feelings [p. 4]), and region. This last concept, in her view, is “less a geographic fact than a social convention” (p. 12), but it has some “geographic specificity” and is a way to categorize people who have something in common. “Regionalism” is a “recognized association between culture and place,” and a “regional culture” is enacted when people know the culture, produce it, and pass it down (p. 11). When passively shared, regional cultures are in a weak form; when self-conscious, emotionally charged, and asserted as distinctive, they are in a strong form. Regional cultural objects, in Griswold’s view, become regional through local content, creator intentions, or institutional processes (media or marketing forces framing cultural objects as regional). Notably, Griswold (2008:12) compares region to other concepts, including ethnicity and nation (and gender, religion, age, class, and sexual orientation), asserting that they are all ways of
categorizing people and useful because they provide others information regarding what a person is like.

WHAT DOES IT MEAN THAT REGION IS A MULTIVALENT CONCEPT?

Griswold has done much to develop the region concept in sociology, notably emphasizing the idea that region should be understood as a concept people use to categorize themselves and others. To argue for the concept’s multivalence, however, I start with the work of Pierre Bourdieu and Rogers Brubaker, who identified the multivalence of a series of related concepts, including ethnicity, nation, and race (e.g., Bourdieu 1987, 1991; Brubaker 2004, 2009, 2010).

Bourdieu’s contribution was, first, to draw attention to the importance of symbolic power to accomplish, through categorizations and other organizations of perceptions, the making of social worlds. In doing so, he argued for a multivalent understanding of these categorizing concepts (Bourdieu 1987, 1991). Specifically, he saw a distinction between these practices as they occur in everyday life—categories of practice or “folk categories,” which Griswold focused on—and the ways social scientists use such categorizations in research. Social scientists use categories of analysis to understand the world, with no expectation that people in the world use the categories at all or in the same way.

Like Griswold, Bourdieu was also interested in how the folk categories of practice could themselves be the subject of study. These practices are enacted by people in the world through actions, reinforcing the categories’ world-making propensities, and rendering individuals into groups that people then see as objective and real, such as ethnic groups or senior citizens. Sociologists can then work to understand this process of group making (Bourdieu 1987).

Brubaker and his colleagues developed these ideas in a series of articles, some collected as a book (Brubaker 2004). They focused primarily on what they saw as flawed social science that denoted “groups” as entities with ontological status, especially ethnic groups, national groups, and racial groups. All are important and related to identity (Brubaker and Cooper 2000), but they are not actual things in the world.

Following Bourdieu, Brubaker embraced the notion of categorizing concepts as multivalent in that they are categories of analysis and categories of practice. He argued that using these concepts as categories of analysis helps make sense of the world—but social scientists need to understand clearly that the categories themselves have no independent existence. Even when there are group-making practices to be studied, ethnicity, nation, and race nevertheless should be approached as elements of the sociology of cognition and as phenomena related to beliefs and perceptions (Brubaker, Loveman, and Stamatov 2004).

Brubaker and colleagues’ contribution most relevant to this analysis of region is an elaborate argument, derived from the idea of multivalence, regarding pitfalls that social scientists should avoid when using ethnicity, nation, and race in research. The first major concern, they argue, relates to the issue of ontology: social scientists need to be aware of the tendency toward reification when studying these subjects (Brubaker 2004, 2010). When researchers reify ethnicities, nations, and races as “groups,” they slide easily into other assumptions that are problematic and not supported by data—specifically, that these “groups” exist not only as material objects but also as material subjects. Such groups are then perceived as internally homogeneous, with agency and interests, and existing in the world with clear, discrete boundaries (Brubaker, Loveman, and Stamatov 2004:45).
Also relevant to the study of region, Brubaker and colleagues emphasize ethnicity, nation, and race as phenomena of time. Put another way, scholars should not assume ethnicities, nations, and races are “static, substantial entities” because the categories are “fully dynamic and processual” (Brubaker 2009:29–30). There may be “moments of intensely felt collective solidarity” where groupness is something that “happens”—or might not happen—to create successful mobilization or “conspicuous violence” (Brubaker 2004:12). Examples include triggers that lead crowds to engage in ethnic, nationalist, or racist rioting or lynching. In this view, ethnicities, nations, and races are categories of practice that emerge and develop over time.

A final concern relates to the boundaries of the concepts. At issue is both the boundaries that set each concept apart from each other, and how boundaries of subcategories within each concept are to be understood. The concepts of ethnicity, nation, and race are not clearly distinctive, and the factors social scientists use to distinguish the concepts (e.g., criteria of membership; transmission of membership; fluidity of membership; importance of physical or visible markers of membership; or importance of language, religion, and culture) are not singularly associated with ethnicity, nation, or race (Brubaker 2009; Brubaker, Loveman, and Stamatov 2004:48). This means boundaries between the concepts and subcategories within them are unstable and shifting, showing a protean quality that depends on a researcher’s use and strategies.

More specifically, the ambiguity in definitions and boundaries of ethnicity, nation, and race can lead to shifts depending on scholars’ particular research questions. This point is important, and because it is less straightforward than the concerns about ontology and time, it is useful to illustrate it with examples. Alba (2018), for instance, shows how the idea of a “majority-minority” society in the United States depends on how persons of mixed minority-white parentage are counted. Social scientists’ choices regarding inclusion of mixed-race individuals in racial categories are also likely to significantly shape results of studies on inequality because darkness of skin can affect life chances (on African American ancestry, see Hochschild and Weaver 2007; on Latino backgrounds, see Gómez 2000). Whether aware of it or not, researchers using ethnicity or race as variables inevitably make choices regarding the boundaries of racial or panethnic categorizations, and decide who fits into which category.

As categories of practice, ethnicity, nation, and race also show shifting boundaries. Social scientists have long seen white ethnic identification as optional and changing (Waters 1990). Responses to U.S. census race and ethnicity questions are not reliable (Skerry 2000), supporting the idea that identification with particular panethnic categories can change over time (Nagel 1996). The counting strategies (boundary placement) regarding minority status discussed by Alba can have significant implications in the real world of practice and policy (Mora and Rodríguez-Muñiz 2017). Nation boundaries also show shifting and protean qualities at the individual level (Ong 1999) and through state policy (Skrentny et al. 2007).

REGION AS PART OF THE ETHNICITY/NATION/RACE FAMILY OF CONCEPTS

The foregoing showed that ethnicity, nation, and race can be studied together as “a single integrated family of forms of cultural understanding, social organization, and political contestation” (Brubaker 2009:22). Could regions be added to that family of multivalent concepts? Despite the common practice of studying regions or using the region concept
separately from these other multivalent concepts, a strong case can be made for region to be included in this family.

First, it is important to note that Bourdieu (1991) believed regions were similar to other categorizing concepts—a point geographers have also acknowledged (Agnew 2013; Paasi 2003). Bourdieu argued that—similar to ethnicities, nations, and races—regions can be the basis of identity, either chosen or externally ascribed. He also maintained there was nothing “natural” about regions, and what is thought of as natural in regional classifications is “to a great extent the product . . . of a previous state of the relations of power in the field of struggle over legitimate delimitation” (Bourdieu 1991:222). For Bourdieu, the criteria for both regional and ethnic identities are mental representations, acts of perception, or self-interested strategies of symbolic representation. Similar to ethnicity, regional group-making is performative, with regional boundaries enacted discursively. All four concepts thus share multivalence—they are both categories of practice and categories of analysis, used to categorize people in the world.

Griswold (2008:12) also saw region as a categorizing concept similar to others, at least as a category of practice: “People use cognitive schemas to categorize one another—gender, ethnicity, religion, nationality, age, class, sexual orientation—and region is one of these primary classifiers.” Asking people to categorize themselves according to any of these is an attempt “to elicit categorical information so as to make some rough guesses about what the other person is like.” Although she does not link her theorizing about regions to Bourdieu, Griswold’s work suggests region is similar in important ways to other categorizing concepts.

Leaving aside Griswold’s linking of region to gender, religion, age, class, and sexual orientation, I focus here on the ways regional analysis shares similarities and pitfalls that Brubaker and colleagues have identified for ethnicity, nation, and race, regarding (1) ontology and relationship to space; (2) relationship to time; and (3) unclear, protean borders or boundaries.

**Regions, Ontology, and the Relationship to Space**

Similar to the ways social scientists can reify ethnicity, nation, and race, we also see social scientists reifying regions when they use the concept as a category of analysis. This occurs when researchers unreflectively adopt folk categories of practice, do not explain what they mean with region names and choices (thus appearing to assume we know and understand the boundaries of their named regions), and attribute internal homogeneity and agency to regions.

Sociologists may be less likely to do this, but it is common in other social sciences. For example, international relations scholars often refer to “Europe” as a thing and discuss Europe’s “will,” “ability,” and “desire” as if it is an actor with material substance and agency (see, e.g., Kagan 2002). Studies of subnational regions may have the same problem. McCann and Ortega-Argilés (2013), for example, in their study of “innovative regions,” describe regions as things with varying capacities to innovate due to various characteristics—some regions innovate a lot, and others not so much. Van Langenhove’s (2013:487) study uses the metaphor of regions as persons—comparing personhood to regionhood, personality to regionality—and considers a region to be “an entity.”

Of special concern on the question of reification and ontology is the possibility of a material dimension to regions—even if regions themselves are not treated as material things—in the ways social scientists use the concept. Even if social scientists avoid the reification of groupism in discussing regions, they might still ascribe materiality to regions.2 Katzenstein
Skrentny (2005:10), for instance, argues that “regions have both material and ideational dimensions,” emphasizing that they are not purely discursive constructions. Thus, social scientists using regions may make reference to material space or territory, or proximate spaces or territories (the notion that these spaces are populated is typically implied).

This makes some sense because far-flung, noncontiguous spaces— that nevertheless share some sociopolitical characteristics or particular ties— cannot be said to be a region and the term still have meaning. For example, Esping-Andersen (1990) did not label his categories of “welfare capitalism” regionally because their features do not correspond with contiguous or at least proximate populations, or any “geographic specificity,” to use Griswold’s (2008:13) phrase. Similarly, the social dynamics that occur in particular places and that allow regional patterns to emerge, such as the regional literatures described by Griswold, cannot be said to constitute a region unless they are spatially proximate or occur in the same territory. In short, regions and material spaces— “real” in the ontological sense— would seem to go together.

However, a comparison with ethnicity, nation, and race shows the connection of region to material space or land is not distinctive, and on the flipside, social scientists can perform regional analyses without direct reference to any material space. First, ethnicities, nations, and races all have some origin story, some link to a space where in scientific or folk understandings they are thought to have arisen. Thus, “White people” are originally from Europe; “Scandinavians” are from Norway, Sweden, Iceland, or Denmark; the “Japanese nation” is from Japan. These origin stories are especially salient in genomic approaches to race that link ancestry to space of origin (Duster 2015; Fujimura and Rajagopalan 2011).

Second, although we can point to “Japan” on a map, what is interesting to social scientists are the Japanese people, not the material space we call “Japan.” And similar to ethnicities, nations, and races, it is possible to study regions separately from any original or defining territory. For example, there are studies of black and white Southerners living outside the South (Gregory 2005). Tolnay and Eichenlaub’s (2006) study of “Southerners in the West” deploys the region concept regarding people twice removed from their original territory: they compare “onward” Southern migrants, who first went to the Northeast and the Midwest and then to the West, with those who went directly from South to West, finding higher incomes and occupational statuses among the former. It is easy to imagine studies of other regionally defined populations, such as “East Africans,” “people from the Rust Belt,” or “Central Asians,” regardless of where they reside.

Of course, the names social scientists use for many categories they denote as ethnic or racial can directly reference regions. For instance, Gereffi and Fonda’s (1992:421) review essay on “regional paths of development,” focusing on “four major third world regions,” lists “Latin America, East Asia, South Asia, and sub-Saharan Africa” excluding South Africa, which roughly corresponds to ethnoracial categories that U.S.-based social scientists commonly use.3 In short, the relationship of region to material space is not distinctive, and for the purpose of the social sciences, regions are cognitively constituted categorizations of people, similar to ethnicities, nations, and races.

**Regions as Temporal Processes or Events**

Brubaker argues that ethnicity, nation, and race are properly understood as historical processes, constituted by events over time periods, rather than static things in the world. Shared experiences and historical sequences are what give meaning to these categories—and to regions as well.
Many studies of regions show them to be processes that unfold over time. The study of regions as institutionalized forms, developing through time, is perhaps most common in the field of international relations. Deutsch and colleagues (1957) discussed the creation of “security communities,” such as the “North Atlantic Area,” where a group of people become “integrated,” meaning they have attained a sense of community and set of institutions that will endure and maintain peace. Adler and Barnett’s (1998a, 1998b) updating of the concept emphasizes how security communities develop through time and involve precipitating conditions, such as the development of trust, identity, and social learning. They use the phrase “historical regions,” such as Southeast Asia and South America (among others), to describe the contexts of security communities, thus combining in a phrase the idea of time passage with the idea of regions (1998b:15–16; see also Hettne and Söderbaum 2000).

Historical approaches to regional institutions are common in the international relations field. Stubbs and Reed (2006:290) describe how the sharing of historical experiences in a definable area is key for states to create regional institutions to manage their affairs; they note that in the face of geopolitical threats or globalization, states and their neighbors may find themselves in similar situations and begin cooperating. Katzenstein (2005:22) shows how “state power and purpose” exercised through time lead to the creation of security regions (e.g., the Rio Pact, North Atlantic Treaty Organization [NATO], Southeast Asia Treaty Organization [SEATO], Warsaw Pact, Organization of American States [OAS], Organization of African Unity [OAU], and Arab League) and economic and trade regions (e.g., NAFTA; also see Pempel 2005; Rozman 2004). Regions lacking institutional form are similarly constituted through shared historical experiences and practices. Halter and Johnson (2014:35, 39), for example, discussing “West Africa,” argue that “historical and ongoing experiences . . . fostered a regional identity” and “complex historical development through trade, politics, religion, and culture ensured that their identities and physical location would transcend the artificial boundaries that followed official European colonization.” As Keating (1997:394), a political scientist, succinctly stated, “A region is a construction, of history and of present-day actions.”

Sociologists have also explored regions as processes developing through time. Related to the work in international relations, Stevens, Miller-Idriss, and Shami (2018) show the region making that occurred when universities, the Social Science Research Council, and the federal government worked together to create “area studies.” This process defined for national security experts and for scholars the meaning of “Latin America,” the “Near and Middle East,” and “Eastern Europe.” These regional categories could then evolve or be roughly maintained through institutional lock-in effects.

We also see sociological approaches to regions-as-temporal-processes in studies of how regional identities become salient. Parigi and Bergemann (2016), for instance, found that when members of Congress from the same region lived together in boardinghouses (a common practice in the early 1800s), their partisan identities became more muted while their regional identities increased in salience.

Regions understood as historical constructions are also apparent in sociological studies of economic development. Hopcroft (2001:146), for example, argues that understanding regional patterns in European economic development requires seeing how legal institutions and historical sequences combine to shape patterns and outcomes. Analogously, Mann and Riley’s (2006:82) study of regional variations in income inequality uses “historical processes, such as defeat or success in war, colonial invasion and the spread of specific cultures” as causal factors to explain regional patterns.

Historical sequences are also crucial for understanding the boundaries of regions in studies of diffusion processes. These may show regionally “channeled learning” (Dobbin,
Skrentny, Simmons, and Garrett 2007) or a “geographical social learning model,” where states look to their neighbors for policy information and guidance because neighbors appear familiar and similar (e.g., Mooney 2001). Soule and Zylan’s (1997) analysis of the diffusion of ADC/AFDC eligibility requirements improves on studies that use off-the-shelf regional definitions without analysis, such as those from the Census Bureau, by showing how regions are made over time. Soule and Zylan (1997:752, emphasis added) hypothesize a sociological mechanism for why a particular region definition makes sense over time: “We expect that states within the same SSA [Social Security Administration] region will be most cognizant of the actions of other states in the same region due to communications from the regional SSA offices.”

Finally, understanding regions as unfolding processes also sheds light on the frequent grouping in sociology of “comparative” and “historical”—institutionalized in the American Sociological Association as the Section on Comparative and Historical Sociology. Regional comparisons in politics that seek to explain persistent patterns and practices thus typically engage work on historical sequences, critical junctures, and policy diffusion (Haydu 1998; Thelen 1999; Wendt 1995).

Regions and Protean Borders/Boundaries

Brubaker and colleagues argue that the conceptual ambiguity inherent in the concepts of ethnicity, nation, and race mean the boundaries are shifting and protean, and when used as a category of analysis, depend on how social scientists frame their research questions. Similarly, when social scientists study regions or use the region concept in their analyses, the boundaries of the region may change depending on the research question. This may be true whether regions are independent, control, or dependent variables.

Griswold (2008:12) suggests research questions can shape regional categorizations, arguing that regions “do not simply fit together like pieces of a puzzle,” but the people living in a particular space can be seen in regions that are nested or overlap, so “if a Florentine poet were to appear in a ‘regional’ anthology . . . the ‘region’ could be Tuscany, central Italy, southern Europe, or the Mediterranean.” Put another way, “there are multiple ways of seeing a place” and “‘regions’ only exist in relation to particular criteria. They are not ‘out there’ waiting to be discovered; they are our (and others’) constructions” (Allen, Massey, and Cochrane 1998:2).

Therefore, a map of the world based on world systems theory (Wallerstein 1999) might show regions very differently than Huntington’s (1996) effort at “civilizational” understanding or regions based on the world’s religions. Bonikowski’s (2010) analysis of global cultural variation makes regional boundaries a subject of study, as he shows that the civilizational understandings of regions have little predictive value when compared to cultural similarities within former colonial empires.

Cox (1969) provided an early attempt to understand regions as changing with research questions, emphasizing researcher agency when using regions as categories of analysis. He argued that for understanding political behavior, regions are similar to social class in that both can be defined in different ways, such that the same individuals could be in different categories for different studies. Cox (1969) advised scholars to tailor the definition of region to their studies so that within-category variation was minimized and between-category variation was maximized, similar to Bonikowski’s strategy.

Clear examples of the protean nature of regional boundaries are apparent if we explore possible categorizations of particular nations. Consider the case of the Swiss. In a study of the formal, regional institution building that created and maintains the European Union,
Swiss policy makers would be left out, as Switzerland is not a member despite being land-locked and surrounded by original EU member states on every side. But studies of cultural practices—religion, language, food, lifestyle, politics—would reasonably include Swiss people. Even if we focus only on formal, regional institution building, regional boundaries might still vary as we change research questions. A study of trade practices, for example, may put U.S. policy makers in a North American region due to NAFTA, whereas a study of national security may put them in a North Atlantic region (with Europeans) due to NATO, and a study of regional variations in human rights protections could put them with Central and South American policy makers in the Organization of American States. Mexico, of course, may be North American for a study of NAFTA but Latin American for other studies. Similar to the categorization of the same individuals in different ethnic, national, or racial boundaries depending on the nature of a study, individuals can be categorized in different regions depending on the social phenomenon in focus.

CONCLUSIONS

A close examination of the concept of region shows it is similar to other concepts in the social sciences, including ethnicity, nation, and race. All four are multivalent concepts. Social scientists use them as a perspective on the social world—a category of analysis—and people use and enact them in their everyday lives—a category of practice.

More specifically, I argued that all four concepts share similar characteristics regarding ontology, relationship to time, and boundaries. Regarding ontology, all four are cognitive phenomena (modes of categorizing people) with similar relationships to space. Particular spaces or places may be relevant to categorization in some origin narratives, but the categories, and the people in them, can be studied separately from material space. Regarding time, each category can be understood as an event or a series of events, processes, or historical sequences that create categorical coherence. Thus, shared experiences through time put people in particular ethnicities, nations, races, and also regions. Regarding boundaries, we saw that all four concepts have a protean quality: different research questions may shape category boundaries, such that social scientists can differently categorize the same people depending on the research question, and people in their everyday lives may see themselves or others as part of different categories for different purposes. Although we tend to think of regions as spaces on maps, understanding region as a multivalent concept helps illuminate that regional analysis in the social sciences matters because it places boundaries around people, not spaces.

I rooted the argument for the multivalence of region in the work of Bourdieu and Brubaker, but larger takeaways from this analysis do not require a full acceptance of their work on the cognitive basis of categorizing concepts. Specifically, the theoretical points about the nature of multivalent concepts lead to theoretical and methodological cautions for any social science work using the region concept.

Perhaps the most basic theoretical point is that region is an important categorizing concept, but it need not, and arguably should not, be studied in isolation from others. Methodologically, researchers who wish to use the concept of region, especially as a category of analysis to understand or explain patterns of behavior or culture, must have clear reasons for choosing particular regions, and especially for their particular boundaries. These reasons should be relevant to the analysis in question, and researchers should not assume that available, off-the-shelf regional boundaries can rigorously serve as meaningful cases, control variables, or explanatory factors.
Another takeaway from this analysis is a call for more social science work on regions as categories of practice. Much literature explores nation-making practices (e.g., Anderson 1991; Gellner 1983; Greenfeld 1992; Hobsbawm 1990) and panethnic or race-making practices (Espiritu 1992; Mora 2014; Okamoto 2014; Skrentny 2002), but little research examines region making as such, and separate strands of productive work are only implicitly on the topic and do not engage each other. If the regional category is important in the social sciences—and its common use indicates it is—we should know more about it.

One potentially fruitful avenue of research might compare the sociological dynamics of region to different classificatory identities, including ethnicity, nation, and race, as well as gender and class. How do regional categories and identities become “locked in,” and how does regional lock-in through institutions, or in identities, compare with other institutional and identity lock-ins? Relatedly, how do time and historical processes matter for different classification concepts? For example, historical sequences of demographic, economic, and political change might affect region, nation, and class categories differently and at different speeds.

Another area of inquiry could illuminate the roles of elites and nonelites in the making of regions as formal institutions and the unintentional, unselfconscious behaviors and discourses that can also create regions. Griswold (2008:13–14) has begun this work by distinguishing between “weak” regional culture that develops from material circumstances and history, and is simply shared by people from the region, and a “strong” version that is assertive, self-aware, identity-conscious, emotionally charged, even celebratory—what she calls “regionalism.” Scholars in international relations have made similar distinctions, emphasizing how the strong version becomes a regional institutional structure (Beeson 2009; Hettne and Söderbaum 2000).

Scholars working in a variety of fields have also shown how elite behavior can create regions without overt intentionality. Mearsheimer’s (2014) theory of geopolitics, for instance, relies on the concept of regions, but regions are incidental to the interests of states, and region making seems to occur as a side effect of other actions designed to ensure national security given conditions that prohibit being a global hegemon. Studies of political economy also show unintentional elite region making that is not necessarily institutionalized formally. Gramsci (2005:70), for example, traced the social situation of Southern Italy to region-making practices and power relations: “The Northern bourgeoisie has subjugated the South of Italy and the Islands, and reduced them to exploitable colonies.” Similarly, Dal Lago’s (2005) comparative study of the American South and the Italian Mezzogiorno focuses on people, not spaces (the book is called Agrarian Elites) and provides an excellent model of the study of region-making practices—specifically, how agrarian elites in both countries, and their actions as landowners and slaveholders, made the two regions through economic exploitation and opposition to centralizing policies of national governments, despite considerable intraregional variation. World systems theory similarly uses the region concept to show region-making behavior that is not formalized and occurs in pursuit of other goals (Arrighi 1999; Wallerstein 1999).

Subnational regions may also be made by elites or nonelites, intentionally or unintentionally. Some regions may have “functional ties,” such as “network/circulation linkages (transport, migration, trade and capital flows)” (Agnew 2013:15). Subnational regions may also emerge from the commuting patterns of people who live in or near cities (Autor and Dorn 2009; Tolbert and Sizer 1996).

There are many excellent studies of how regions are made, but without recognition of the multivalence of the region concept and how it fits with related concepts, such as ethnicity, nation, and race, these are lost opportunities to build theory. These studies can be seen as cases of the larger phenomenon of region making that contribute to understandings of
regional boundary placement, region-making scope conditions and propensities, and linkages to regions as categories of analysis.

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NOTES

1. Hopcroft (2001) focuses on the “Theoretical Implications of Regional Effects” but does not define “region” or “regional effect.”
2. Here I am excluding the regional analyses of human geographers, for whom physical territory is a matter of study in unique ways that put space and the materiality of territory centrally in focus. Thus, geographers have debates on the relational and territorial status of regions (e.g., Agnew 1999, 2013; Jonas 2012; Lagendijk 2007; Varró and Lagendijk 2013) that may appear esoteric to sociologists and other social scientists. Geographers may refer to “real differences between parts of the world” (Agnew 1999:93) and the “ontology of relational space” (Macleod and Jones 2007:1183).
3. At the same time, there are folk understandings and constructions of some region-defined peoples as phenotypically or physically distinct—for example, Southern Italians as darker or less capable than those residing in Northern Italy (Foner 2005).

REFERENCES


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