

# 1. Wallerstein 2.0

## Thinking and Applying World-Systems Theory in the 21st Century

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### Introduction

“My intellectual biography is one long quest  
for an adequate explanation of contemporary reality  
that I and others might act upon.”<sup>1</sup>

Immanuel Wallerstein is often named “the master of the field”<sup>2</sup> when scholars discuss world-systems theory, and while there are others whose works paved the way for this kind of analysis,<sup>3</sup> it is true that the former had a prominent position within the field he helped to create. Wallerstein, however, would not only be perceived as a “worldwide renowned and influential sociologist and economic historian, interdisciplinary researcher of the emergence, functioning and structural crisis of the polarised world system of capitalist economy, as well as radical intellectual who closely related scientific analysis and political action of antisystemic movements,”<sup>4</sup> but also as a “prolific writer and forceful

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1 Immanuel Wallerstein, *The Essential Wallerstein* (New York: The New Press, 2000), 15.

2 William G. Martin, “Still Partners and Still Dissident after All These Years? Wallerstein, World Revolutions and the World-Systems Perspective,” *Journal of World-Systems Research* 11, no. 2 (2000): 235.

3 For a broader survey of the field and relevant works see Salvatore J. Babones and Christopher Chase-Dunn, eds., *Routledge Handbook of World-Systems Analysis* (London/New York: Routledge, 2012).

4 Vera A. Vratiša Žunjić, “In Memoriam: Scientific and Political Legacy of Immanuel Wallerstein (1930–2019),” *Sociološki pregled / Sociological Review* 53, no. 4 (2019): 1339.

polemicist on a wide range of topics from contemporary Africa to social theory.”<sup>5</sup> Considering both of these sides of Wallerstein’s voluminous œuvre, it is safe to agree with Christopher Chase-Dunn, Jackie Smith, Patrick Manning, and Andrej Grubačić, who described Wallerstein as “an intrepid protagonist of human equality and an innovative and influential social scientist who led a scholarly movement to build a coherent framework for understanding the emergence and development of global capitalism.”<sup>6</sup> Wallerstein was searching for theoretical answers to historical problems<sup>7</sup> as well as a way to “translate the lessons from [world-systems] analyses into action aimed at transforming this indisputably unjust system.”<sup>8</sup> Indeed, Wallerstein and his colleagues opened a path for a specific look at the history and the current state of the globalized world, and world-systems theory became an essential part of the analysis of capitalist modernity. Despite often being criticized and probably never truly en vogue for a majority of scholars in the humanities and social sciences, world-systems theory can offer more than is frequently anticipated.<sup>9</sup> Before these aspects are taken into closer consideration, a closer look at Wallerstein’s life and work and the elements or events that influenced them seems to be in order to see how his conceptualization of what would later be termed “world-systems theory” or “world-systems analysis” was, in a certain way, just a consequence of his personal experiences.

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5 Robert S. DuPlessis, “Wallerstein, World Systems Analysis, and Early Modern European History,” *The History Teacher* 21, no. 2 (1988): 221.

6 Christopher Chase-Dunn, Jackie Smith, Patrick Manning, and Andrej Grubačić, “Remembering Immanuel Wallerstein,” *Journal of World-Systems Research* 26, no. 1 (2020): 5.

7 Robert A. Denemark and Barry K. Gills, “World-System History: Challenging Eurocentric Knowledge,” in *Routledge Handbook of World-Systems Analysis*, eds. Salvatore J. Babones and Christopher Chase-Dunn (London/New York: Routledge, 2012), 163–171.

8 Chase-Dunn, Smith, Manning, and Grubačić, “Remembering Immanuel Wallerstein,” 6.

9 Walter L. Goldfrank, “Wallerstein’s World-System: Roots and Contributions,” in *Routledge Handbook of World-Systems Analysis*, eds. Salvatore J. Babones and Christopher Chase-Dunn (London/New York: Routledge, 2012), 97–103. See also the recently published anthology on the “critical juncture” of world-systems analysis: Corey Payne, Roberto Patricio Korzeniewicz, and Beverly J. Silver, eds., *World-Systems Analysis at a Critical Juncture* (London/New York: Routledge, 2022).

## Wallerstein's Life and Work

I believe that I have been fairly consistent in my views over the time I have been writing. Still, I have to acknowledge that there were three turning points in my political and intellectual development. The first, as I have already indicated, was my struggle with the issues that have plagued the left for most of its organizational history—the rift between the Second and Third Internationals. The second was my encounter with Africa and with national liberation movements. This enabled me to put the debates of the Internationals into their proper context, as essentially European debates that ignored the fundamental and ongoing polarization of the capitalist world-economy. And the third was the world revolution of 1968, which I experienced directly at Columbia University, and which helped expunge from my thinking both the lingering illusions of liberalism and a rosy view of the antisystemic movements. It sobered me up.<sup>10</sup>

Wallerstein, born in 1930 as a child of a “German Jewish immigrant family” in New York City, grew up in an international metropolis until he went to study sociology at Columbia University in 1947.<sup>11</sup> He chose this subject due to the “freedom offered by this then young discipline, whose boundaries were not rigid,” and when one considers the broad diversity of topics Wallerstein worked on during his career, he probably continued to appreciate the freedom sociology as a discipline offered him.<sup>12</sup> Early on, Wallerstein grew up with a political conscience that was stimulated by his family and the possibilities provided by the metropolis, which acted as “both a haven for refugee intellectuals and the prime vantage point for seeing the world as a whole.”<sup>13</sup> Wallerstein himself said that his

family was politically conscious, and world affairs were always discussed in our home. The fight against Nazism and fascism was of primary concern to us long before Pearl Harbor. We were also very conscious of the great split in

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<sup>10</sup> Wallerstein, *The Essential Wallerstein*, xxi-xxii.

<sup>11</sup> Stéphane Dufoix and Yves-David Hugot, “Le système-monde Wallerstein,” *Socio* 15 (2021): 9–19.

<sup>12</sup> *Ibid.*

<sup>13</sup> Walter L. Goldfrank, “Paradigm Regained? The Rules of Wallerstein’s World System Method,” *Journal of World-Systems Research* 11, no. 2 (2000): 153.

the global left at the time, that between the Second and Third Internationals. Even in the muted atmosphere of wartime unity, the issues that divided the two Internationals were salient, and they were reflected for me at a local level by the political differences between New York's Liberal and American Labor parties. When I entered Columbia College in 1947, the most vibrant political organization on campus during my freshman year was the American Veterans Committee (AVC). Although I was too young to have been a veteran, I attended the public meetings of the AVC, and saw it torn apart (and destroyed) by this same split.<sup>14</sup>

This political split within the Internationals and the struggle or divide between communism and social democracy would have a long-term impact on the thoughts of Wallerstein.<sup>15</sup>

Wallerstein was a student at Columbia University until 1957. He turned out to be an Africanist first and foremost, and he later became the president of the American Association of Africanists in 1973.<sup>16</sup> After a Master's thesis on McCarthyism, Wallerstein focused on Africa for his PhD thesis, which compared the nationalist movements in two African states: the Ivory Coast and Ghana.<sup>17</sup> Although Wallerstein studied continuously at Columbia, he also took opportunities to study abroad, e.g., in Paris, where his "experience gave him access to a rich and proud scholarly tradition which could reinforce his New Yorker's disdain for conventional U.S. social science, a tradition which was furthermore free from the rigidities of pre-New Left Marxism."<sup>18</sup>

Wallerstein's dissertation-related fieldwork also led him into the so-called Third World, where he could gain first-hand impressions of the consequences of Western imperialism at a time in which those scholars whose work focused

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14 Wallerstein, *The Essential Wallerstein*, xv.

15 Ibid. Wallerstein argues in this regard: "Politically, this created dilemmas with which I have had to wrestle ever since. Intellectually, it turned me to a set of questions that I have developed in my writings over the years: the nature of what I came to call the anti-systemic movements, and how their activities were structured by systemic constraints from which they were never able fully to release themselves."

16 Dufoix and Hugot, "Le système-monde Wallerstein."

17 Immanuel Wallerstein, *The Road to Independence: Ghana and the Ivory Coast* (Paris: Mouton, 1964). The book was described as "unremarkable in theory or method but notable for the high degree of personal involvement in the research." Goldfrank, "Paradigm Regained?" 156.

18 Goldfrank, "Paradigm Regained?" 155.

on Africa could not yet claim to be part of a specific disciplinary field but who would ultimately help to forge one.<sup>19</sup>

Besides his PhD thesis, which was later published as a book as well, Wallerstein wrote “two influential books”<sup>20</sup> on Africa: *Africa: The Politics of Independence* (1961) and *Africa: The Politics of Unity* (1967).<sup>21</sup> While working on topics related to African history and politics, “Wallerstein’s early career and thinking was profoundly impacted by his friendship with Frantz Fanon, whose thinking remained among the most important influences on Wallerstein’s work.”<sup>22</sup> Fanon’s critical works about colonialism and imperialist exploitation influenced Wallerstein’s critical thought about questions related to the capitalist world-system that he later formulated through his own theoretical reflections.<sup>23</sup> Wallerstein’s reading of Walter Rodney’s work about the intentional underdevelopment of Africa<sup>24</sup> to serve European capitalism and expansionism may have been similarly important, although the former did not consider parts of the work “very satisfying.”<sup>25</sup> However, Wallerstein later invited Rodney to work with him and used the latter’s considerations as a basis for his own critical approach toward a better understanding of Africa:

To understand Africa, we must reconceptualize world history. And for the scholarly world to effectuate such reconceptualization, we as Africanists must do our share by doing our work within such a perspective. I am not calling for intellectual supermen. I am merely asking that we concentrate on grinding a new pair of glasses, and that we wear these new glasses in the very process of grinding them. This is a hard task, but not a new one, since this is the only way in which man has ever invented the new truths

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19 Immanuel Wallerstein, “Africa in a Capitalist World,” *Issue: A Journal of Opinion* 10, no. 1/2 (1980): 21.

20 Vratuša Žunjić, “In Memoriam,” 1340.

21 Immanuel Wallerstein, *Africa: The Politics of Independence* (New York: Vintage Books, 1961); Immanuel Wallerstein, *Africa: The Politics of Unity* (New York: Random House, 1967).

22 Chase-Dunn, Smith, Manning, and Grubačić, “Remembering Immanuel Wallerstein,” 6.

23 Frantz Fanon, *Les damnés de la terre*, with a preface by Jean-Paul Sartre (Paris: Maspero, 1961).

24 Walter Rodney, *How Europe Underdeveloped Africa* (London: Bogle-L’Ouverture, 1972).

25 Wallerstein, “Africa in a Capitalist World,” 25.

that caught up his new realities and yet simultaneously criticized these new realities in the light of human potentialities.<sup>26</sup>

Although Wallerstein's research focus eventually drifted away from Africa, he was well aware of the role it had played in his own scientific formation: "I credit my African studies with opening my eyes both to the burning political issues of the contemporary world and to the scholarly questions of how to analyze the history of the modern world-system. It was Africa that was responsible for challenging the more stultifying parts of my education."<sup>27</sup>

Another experience that tremendously impacted Wallerstein's life and intellectual development was the global revolution of 1968. The events and experiences in this year seem to have given more focus to Wallerstein's thoughts about the world-system, which until then had been more confused. His writings of the early 1960s dealt with numerous elements of his world-systems theory, but the trigger to bring them together into one larger theoretical framework must have been this year of global revolutionary developments.<sup>28</sup>

However, Wallerstein's theoretical transition was not only related to his observation of the global protests of 1968, as the young sociologist was actually quite involved in the political struggles that accompanied or expressed this "global revolution" in its US context. His involvement seemed to weaken his academic position at Columbia University in the early 1970s, which is why he left for McGill University in 1971, while his colleague Terence Hopkins<sup>29</sup> moved on to SUNY Binghamton, where both would work together again from 1976. There were consequently also personal changes that might have stimulated Wallerstein's reorientation with regard to his research, although, as Gregory

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26 Ibid., 25–26.

27 Wallerstein, *The Essential Wallerstein*, xvii.

28 Chase-Dunn, Smith, Manning, and Grubačić, "Remembering Immanuel Wallerstein," 5; Gregory P Williams, *Contesting the Global Order: The Radical Political Economy of Perry Anderson and Immanuel Wallerstein* (Albany, NY: State University of New York Press, 2020), 91.

29 Terence Hopkins (1928–1997) was an American sociologist who was important for the study of world-systems theory at Binghamton, where he founded the graduate program in sociology. He worked closely with Wallerstein, and together they published, among other works: Terence K. Hopkins and Immanuel Wallerstein, eds., *Processes of the World-System* (Beverly Hills, CA: Sage Publications, 1980); Terence Hopkins and Immanuel Wallerstein, *World-Systems Analysis: Theory and Methodology* (Beverly Hills, CA: Sage Publications, 1982). See also Immanuel Wallerstein, "Terence K. Hopkins (11/20/1928 – 1/3/1997)," *Review* (Fernand Braudel Center) 39, no. 1/4 (2016): n.p.

P. Williams remarked, “[t]he transition Wallerstein underwent from 1967 to 1973 was not in research topic, but rather in historical imagination and measurement.”<sup>30</sup> The student protests in New York City “pushed him further to the left politically,” a fact that partially influenced Wallerstein’s decision to leave Columbia University, “impelling him further towards a kind of sublimated revenge against the academic establishment.”<sup>31</sup> The protesters in New York City expressed their voices against the war in Vietnam in solidarity with the civil rights movement and, at the same time, demanded more political rights for students. In this situation, Wallerstein was among those faculty members who were solidaric with the students and supported their demands. He was “one of ... very few white professors trusted by the black students in the undergraduate college, and took a leading role in drafting the left faculty’s proposed reforms.”<sup>32</sup> He also documented the crisis of the university system in a later publication.<sup>33</sup>

It was in the 1970s that Wallerstein, mainly due to his recent experiences, began to take a different look at the world and began to coin “world-systems analysis,” a process based for him on “major intellectual decisions. [One, and probably the most important,] was that the choice of the ‘unit of analysis’ was crucial, and that the only plausible unit of analysis was a ‘world system,’ or more generally, an ‘historical social system.’”<sup>34</sup> Eventually, Wallerstein’s changed perspective was, as Walter L. Goldfrank described it, “a formidable synthesis of continental historicism, ‘Third World’ radicalism, and Marxism.”<sup>35</sup> His former research on Africa stimulated this intellectual transformation, especially considering the fact, outlined by American sociologists Daniel Chirot and Thomas D. Hall, that “[w]orld-system theory is a highly political approach to the problem of economic development in the Third World. It was created by policy-oriented intellectuals in countries at a medium level of development to account for their societies’ demonstrable inability to catch up to the rich countries.”<sup>36</sup> Within American sociology, world-systems theory was perceived “as a direct

30 Williams, *Contesting the Global Order*, 93.

31 Goldfrank, “Paradigm Regained?” 157–158.

32 *Ibid.*, 158.

33 Immanuel Wallerstein, *University in Turmoil: The Politics of Change* (New York: Atheneum, 1969).

34 Wallerstein, *The Essential Wallerstein*, xvii.

35 Goldfrank, “Paradigm Regained?” 150.

36 Daniel Chirot and Thomas D. Hall, “World-System Theory,” *Annual Review of Sociology* 8 (1982): 81.

attack against the version of development theory that had prevailed in the 1950s and 1960s<sup>37</sup> and therefore, in a way, expressed a generational struggle within the discipline as such. The idea to apply world-systems analysis would change the way modernization and development were to be understood and thereby also challenged previous theoretical reflections about these processes.

While Walt W. Rostow, an American economist, argued for a “uniform evolutionary theory of development,”<sup>38</sup> this only considered developing societies to move in one direction through the following stages: “traditional economies, the transition to take-off (the adoption of scientific methods of technology), the take-off (rapid capital accumulation and early industrialization), the drive to maturity (high industrialization in which the standard of living of the masses remains low), and the age of high consumption.”<sup>39</sup> In contrast to many who shared Rostow’s ideas about the flow of development from one stage to another and who next expected a post-industrial stage,<sup>40</sup> those who believed the world-system to be a better or more suitable analytical unit countered such considerations. The latter group included the German-American sociologist and economic historian Andre Gunder Frank,<sup>41</sup> whom Wallerstein referred to as “one of the major figures of world anti-Establishment thought in the twentieth century”<sup>42</sup> and probably “one of the most polemical and simplistic of the world-system theorists, but one of the most intellectually influential.”<sup>43</sup>

Ultimately, however, it was Wallerstein “who brought world-system theory (including the name itself) into the sociological limelight in the 1970s.”<sup>44</sup> In 1976, Wallerstein took the chance to join Hopkins at Binghamton, where they would work together closely and found the Fernand Braudel Center.<sup>45</sup> Their

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37 Ibid.

38 Ibid., 82.

39 Ibid. For his full theoretical approach, see Walt W. Rostow, *The Stages of Economic Growth: A Non-Communist Manifesto* (Cambridge: Cambridge University Press, 1960).

40 Daniel Bell, *The Coming of Post-Industrial Society: A Venture in Social Forecasting* (New York: Basic Books, 1973).

41 Frank’s works include, among others, *The Development of Underdevelopment* (New York: Monthly Review Press, 1966) and *Dependent Accumulation and Underdevelopment* (New York: Monthly Review Press, 1978).

42 Immanuel Wallerstein, “Remembering Andre Gunder Frank,” *History Workshop Journal* 61 (2006): 305.

43 Chirot and Hall, “World-System Theory,” 83.

44 Ibid., 84.

45 The center unfortunately closed in June 2020.

research challenged “classical ideas” about development,<sup>46</sup> and his theoretical approach to history, namely the study and analysis of world-systems, would make Wallerstein well-known beyond his original field of research and expertise. In addition, his position as Distinguished Professor and Chair provided Wallerstein with some advantages. For example, in addition to directing the new center, he could bring in new faculty members and hire some foreign visiting professors as adjuncts. The center also published the newly established journal *Review*, which would have a particular impact on world-systems studies in the following decades.<sup>47</sup>

With such a secure position, Wallerstein could safely pursue his academic endeavors, and it was he, together with Frank, Samir Amin, and Giovanni Arrighi (the so-called “Gang of Four”), who continued to stress the importance of the world-system as an analytical category to better understand the world.<sup>48</sup> Wallerstein later stated that they “agreed on at least eighty per cent of the analysis of the modern world. As for those issues about which we disagreed, there was no pattern to the alliances among us. But it was the areas of accord that were the most important to us.”<sup>49</sup>

Wallerstein’s ideas and others’ criticism of them shall be briefly summarized in the next section to illuminate the intellectual impact world-systems theory has had within numerous fields of research.

## World-Systems Theory

World-systems analysis ... is not a theory but a protest against neglected issues and deceptive epistemologies. It is a call for intellectual change ... It is an intellectual task that is and has to be a political task as well.<sup>50</sup>

Wallerstein’s world-systems theory is well-known and probably does not need a substantial introduction.<sup>51</sup> However, Walter L. Goldfrank’s well-worded sum-

46 Terence K. Hopkins and Immanuel Wallerstein, “Patterns of Development of the Modern World-System,” *Review* (Fernand Braudel Center) 39, no. 1/4 (2016): 83–128.

47 Goldfrank, “Paradigm Regained?” 158; Williams, *Contesting the Global Order*, 2.

48 Samir Amin, Giovanni Arrighi, Andre Gunder Frank, and Immanuel Wallerstein, *The Dynamics of Global Crisis* (New York: Monthly Review Press, 1982).

49 Wallerstein, “Remembering Andre Gunder Frank,” 306.

50 Wallerstein, *The Essential Wallerstein*, xxii.

51 For a short and concise introduction, see Goldfrank, “Paradigm Regained?” 177–182.

mary will be reproduced here to provide a short evaluation of his theory and its impact within different disciplines:

Wallerstein's method of reconceptualization and reinterpretation has regenerated many long-standing controversies in social science. To some extent, this is due to the confusing disjuncture between general concepts and explanatory building blocks. To some extent, it is due to the difficulty of giving new technical meanings to familiar words, such as "world" (as applying to anything less than the globe), "empire" (as applied in the usage "world-empire" to redistributive totalities), and "capitalism" ("capitalist" accumulation plus "primitive" accumulation within a system of unequally strong, competitive states). But if some of the contributions to these controversies are old songs sung by new voices, most seem to be sophisticated and useful in advancing both theoretical and substantive work on questions of large-scale, long-term change. The work of Wallerstein and his collaborators, while still unfinished, has provided a major push to historical social analysis, including historical analysis of the present.<sup>52</sup>

Andrew B. Appleby has emphasized the value of Wallerstein's theoretical approach for historical research in particular, as the latter showed and emphasized the necessity to apply better theoretical toolsets to avoid historians "drowning in their own data" and keep them from ending up in "the dust bins of antiquarianism."<sup>53</sup> In contrast to history as a field, sociology, particularly in the US context, "has been marked by an almost pervasive disinterest in history as an element of explanation of present and future social relations."<sup>54</sup> This made Wallerstein's approach quite unconventional for sociologists there, to say the least. Wallerstein consequently also revived an interest in historical studies, especially since his considerations demanded a longer time span to explain social change and the state of the current world. *The Modern World-*

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52 Goldfrank, "Paradigm Regained?" 193.

53 Andrew B. Appleby, "Review of Immanuel Wallerstein. *The Modern World-System: Capitalist Agriculture and the Origins of the European World-Economy in the Sixteenth Century*," *The American Historical Review* 80, no. 5 (1975): 1323–1324, cited in DuPlessis, "Wallerstein," 222.

54 Stanley Aronowitz, "A Metatheoretical Critique of Immanuel Wallerstein's 'The Modern World System,'" *Theory and Society* 10, no. 4 (1981): 503.

*System* thus changed perceptions of social change as such, something a single scholarly work had not been able to achieve for a long time.<sup>55</sup>

In the first volume of *The Modern World-System*, Wallerstein explained how the modern capitalist world-system had been created since the beginning of the 16<sup>th</sup> century and in which ways “[t]his complementary and interlocking structure of labor delivered to the states and privileged classes of the core the chief benefits of capital accumulation in the world-system as a whole.”<sup>56</sup> The latter, by these processes, is eventually divided into core, semi-periphery, and periphery. Although Wallerstein continues to describe its development in the following volumes on the world-system, including cyclical trends, the main theoretical frame had been laid out in the first volume. All in all, it is “[t]he boldness of his approach, his capacity to combine close attention to a specific period with a theory of historical transformation,” that, according to Stanley Aronowitz, offers “a kind of model of historical sociology.”<sup>57</sup> Wallerstein’s “central idea” challenged existent thoughts about history and development, arguing that “the modern global system has an evolving hierarchy based on institutionalized exploitation.”<sup>58</sup> What is probably more significant, and also makes Wallerstein’s world-systems theory an important analytical tool in different disciplinary contexts, is the fact that “the *whole system* was the proper unit of analysis, not national societies, and that development and underdevelopment had been structured by the long history of global power relations, shaped over centuries.”<sup>59</sup> His analysis in this regard also surpassed the nation-state or national society as an analytical boundary and offered a truly global and more comparative approach to the understanding of the maturation and the current state of the world.<sup>60</sup> American sociologist Philip McMichael called this approach an “incorporated comparison,”<sup>61</sup> as it compares the de-

55 Ibid. Aronowitz compares the impact of *The Modern World-System* with Karl Polanyi’s *The Great Transformation* (New York: Farrar & Rinehart, 1944).

56 Steve J. Stern, “Feudalism, Capitalism, and the World-System in the Perspective of Latin America and the Caribbean,” *The American Historical Review* 93, no. 4 (1988): 830.

57 Aronowitz, “A Metatheoretical Critique,” 503.

58 Chase-Dunn, Smith, Manning, and Grubačić, “Remembering Immanuel Wallerstein,” 5.

59 Ibid.

60 Philip McMichael, “Incorporating Comparison within a World-Historical Perspective: An Alternative Comparative Method,” *American Sociological Review* 55, no. 3 (1990): 385–386.

61 Ibid., 386.

velopments or states of different parts of the world system within the latter's wholeness.<sup>62</sup> This, in a way, also secures a more critical and, probably more importantly, flexible approach with regard to the analytical units, as “[t]he whole ... does not exist independent of its parts. Whether considering nation-states or a singular world system, neither whole nor parts are permanent categories or units of analysis.”<sup>63</sup> In contrast to previous analytical units, for Wallerstein, the world-system offered “a self-contained entity based on a geographically differentiated division of labor and bound together by the world market and the international system of national states,”<sup>64</sup> and it could be “used to describe the difficulties of change within advanced industrial societies.”<sup>65</sup>

Wallerstein intended to change the way we look at the world when we try to understand it. Regardless of the criticism his theoretical approach may have caused, he was relatively successful in this because many scholars have since begun to study the modern world-system and applied his theoretical reflections to the point that world-systems analysis developed its own disciplinary frame. Wallerstein later reflected on his analytical approach as follows:

World-systems analysis allowed me to range widely in terms of concrete issues, but always in such a way that the pieces might fit together at the end of the exercise. It is not that world-systems analysis enabled me to “discover the truth.” It is rather that it enabled me to make what I considered to be plausible interpretations of social reality in ways that I believe are more useful for all of us in making political and moral decisions.<sup>66</sup>

The modern world-system, or, as Wallerstein insisted, “a capitalist world-economy,”<sup>67</sup> and its formation or establishment determined the course of human history and the development of human societies, creating “five major cleavages of our modern world: race, nation, class, ethnicity, and gender.”<sup>68</sup> Wallerstein not only wanted to explain the creation of the modern world-system but also,

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62 Immanuel Wallerstein, *Welt-System-Analyse: Eine Einführung* (Wiesbaden: VS Verlag für Sozialwissenschaften, 2019), 22.

63 McMichael, “Incorporating Comparison,” 386.

64 Chase-Dunn, Smith, Manning, and Grubačić, “Remembering Immanuel Wallerstein,” 5.

65 Williams, *Contesting the Global Order*, 94.

66 Wallerstein, *The Essential Wallerstein*, xviii.

67 *Ibid.*, xix.

68 *Ibid.*

in a way, to decode it: "It seems to me that it is the duty of the scholar to be subversive of received truths, and that this subversion can be socially useful only if it reflects a serious attempt to engage with and understand the real world as best we can."<sup>69</sup> World-systems analysis thereby allows a focus on a space-time context that passes through multiple political and cultural units, although the overall system follows a particular set of rules.<sup>70</sup> In this regard, Wallerstein applied ideas previously expressed by the French historian Fernand Braudel, especially concerning the multiplicity of social times and the *longue durée*.<sup>71</sup> The latter, as Wallerstein emphasized, was the lifetime of a particular world-system that would be analyzed.<sup>72</sup>

As a result of his bold ideas, Wallerstein was criticized from all sides, be it Marxists, who argued that world-systems analysis would "neglect the productionist basis of surplus value and the class struggle between bourgeoisie and proletariat as a central variable of social change,"<sup>73</sup> or the defenders of state autonomy, who criticized the economic dependency of the world-system.<sup>74</sup> Other critics tried to emphasize that world-systems theory would be Eurocentric in its historical approach and interpretation due to its lack of a stronger focus on culture.<sup>75</sup> Considering that Wallerstein tried to foster a broad analytical framework, he was naturally in danger of certain shortcomings that would open the door to critical remarks: "When one is dealing with a complex, continuously evolving, large-scale historical system, concepts that are used as shorthand descriptions for structural patterns are only useful to the degree one clearly

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69 Ibid., xxi.

70 Wallerstein, *Welt-System-Analyse*, 22.

71 Fernand Braudel, "Histoire et Sciences sociales: La longue durée," *Annales* 13, no. 4 (1958): 725–753.

72 Wallerstein, *Welt-System-Analyse*, 24.

73 Ibid., 26. See also Robert A. Denemark and Kenneth P. Thomas, "The Brenner-Wallerstein Debate," *International Studies Quarterly* 32, no. 1 (1988): 47. Robert Brenner was one of Wallerstein's harshest critics, and as Denemark and Thomas point out, "[f]or Brenner, the nation-state is the proper level of analysis, and the proper unit of analysis is the class. For Wallerstein, in contrast, the world-system is the proper level of analysis, and there are a number of units of analysis of interest, including classes and states." Ibid., 48. Brenner was later also criticized by Theda Skocpol. Daniel Garst, "Wallerstein and His Critics," *Theory and Society* 14, no. 4 (1985): 469–470.

74 Wallerstein, *Welt-System-Analyse*, 26. See also Aristide Zolberg, "Origins of the Modern World System: A Missing Link," *World Politics* 33, no. 2 (1981): 255.

75 Ibid., 27.

lays out their purpose, circumscribes their applicability, and specifies the theoretical framework they presuppose and advance.”<sup>76</sup> Wallerstein intended to investigate the structures of the modern world-system that “manifest themselves in cyclical rhythms, that is, mechanisms which reflect and ensure repetitive patterns. But insofar as this system is historical, no rhythmic movement ever returns the system to an equilibrium point but instead moves the system along various continua which may be called the secular trends of this system.”<sup>77</sup> The world-system’s existence and functioning also impacted cultural developments, especially since it was used to distinguish the different spheres and groups within the world-economy.<sup>78</sup>

While world-systems analysis was initiated in the 1970s by people for whom it “was an attempt to combine coherently concern with the unit of analysis, concern with social temporalities, and concern with the barriers that had been erected between different social science disciplines,”<sup>79</sup> its impact went much further than this. Economic historian Eric Vanhaute correctly emphasized that “nowadays world and global history would be in a different shape without Wallerstein’s work,” because the latter “has triggered a wide array of research, including different topics and questions, different research strategies, different scopes, scales and units of analysis.”<sup>80</sup> Furthermore, to quote Vanhaute once more, “world-systems analysis has avoided the sharp categorical distinctions central to other approaches within modernization and globalization studies. It suggests the possibility of concurrent but divergent paths of development and stresses continuous rather than dichotomous processes.”<sup>81</sup> It can also help to explain global protest movements as they occurred in the first decades of the 20th century—often in waves and even in the core

76 Wallerstein, *The Essential Wallerstein*, 253.

77 Ibid., 253–254.

78 Ibid., 265–268.

79 Wallerstein, *Welt-System-Analyse*, 22.

80 Eric Vanhaute, “Immanuel Wallerstein’s Lasting Impact on the Field of World History: A Historian’s View,” *Socio* 15 (2021): 93–103.

81 Ibid.

regions<sup>82</sup>—as an expression of unrest within the existent world-system.<sup>83</sup> Hence, due to its relation with the end of the Cold War—a process that led some to believe history had ended with the victory of US-led liberalism—the world-system seemed to change once more.<sup>84</sup> From Wallerstein's perspective, the 21st century marked a caesura for the world-system and its state:

We are at a triple turning-point. World capitalism is facing a long-term structural squeeze on profits, and its major institutional prop, the modern state, is under severe attack. The structure of knowledge that has been produced in this capitalist world-system and has served as its intellectual underpinnings is also under severe attack. And the interstate container of the system is going through one of its periodic restructurings, but this time it is as likely to decenter the system as to hold it together.<sup>85</sup>

Regardless of these restructurings, the state, as Wallerstein emphasized, was still a capitalist necessity; thus, while the “players” within the world-system may be the same, their position within it was contested—particularly in the post-Cold War era—as the system did not collapse but began to shift again, a process that might not even yet be fully concluded.<sup>86</sup>

Naturally, Wallerstein's systematization of historical processes and the current state of societies was not generally greeted with support and understanding. Very often, his work became the target of harsh criticism, further stimulating the circulation of the debate about world-systems analysis. The theoretical approaches Wallerstein proposed aroused some enthusiasm in the US, Latin America, and some European countries but not in others; for example, in France, world-systems analysis was not embraced enthusiastically by

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82 For a detailed discussion of one such global wave in relation to the First World War, see Marcel Bois, “1916–1921: Ein globaler Aufruhr,” in *Zeiten des Aufruhrs (1916–1921): Globale Proteste, Streiks und Revolutionen gegen den Ersten Weltkrieg und seine Auswirkungen*, eds. Marcel Bois and Frank Jacob (Berlin: Metropol, 2020), 13–57.

83 Minqi Li, “The End of the ‘End of History’: The Structural Crisis of Capitalism and the Fate of Humanity,” *Science & Society* 74, no. 3 (2010): 292.

84 Immanuel Wallerstein, “Islam in the Modern World-System,” *Sociologisk Forskning* 43, no. 4 (2006): 68. For the most influential exponent of this view, see Francis Fukuyama, *The End of History and the Last Man* (New York: The Free Press, 1992).

85 Immanuel Wallerstein, “Contemporary Capitalist Dilemmas, the Social Sciences, and the Geopolitics of the Twenty-First Century,” *The Canadian Journal of Sociology / Cahiers canadiens de sociologie* 23, no. 2/3 (1998): 141.

86 *Ibid.*, 142.

French academia.<sup>87</sup> However, Wallerstein faced more than enthusiasm regarding the reception of his attempt to change the way we look at and understand the world. Indeed, numerous reviews expressed harsh criticism.<sup>88</sup>

This, however, is only one side of the story. Many understood the value of Wallerstein's ideas, which had often been presented too simplistically,<sup>89</sup> and Theda Skocpol provided a more nuanced reading of Wallerstein's work, particularly *The Modern World-System*. According to the well-known US sociologist, the book "aims to achieve a clean conceptual break with theories of 'modernization' and thus provide a new theoretical paradigm to guide our investigations of the emergence and development of capitalism, industrialism, and national states. This splendid undertaking could hardly be more appropriately timed and aimed."<sup>90</sup> Skocpol appreciated Wallerstein's ambition to avoid an "intellectual dead-end of ahistorical model-building"<sup>91</sup> and critically and ambivalently argued that

*The Modern World-System* is a theoretically ambitious work that deserves to be critically analyzed as such. And, as I shall attempt to show, Wallerstein's arguments are too misleading theoretically and historically to be accepted at face value. Because *The Modern World-System* does suffer from inadequacies of reasoning and evidence, there may be hypercritical reviews that will use the book's weaknesses as an excuse for dismissing out of hand any such world-historical or Marxist-oriented approach. With such an evaluation I have no sympathy. Like many other important pioneering works, Wallerstein's *Modern World-System* overreaches itself and falls short of its aims. It is therefore incumbent especially upon those of us who are sympathetic to its aims to subject this work to rigorous critical scrutiny. For the true contribution of *The Modern World-System* will lie, not in the proliferation of empirical

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87 Dufoix and Hugot, "Le système-monde Wallerstein."

88 For a summary of the negative criticism Wallerstein received, see DuPlessis, "Wallerstein." See also Denemark and Thomas, "The Brenner-Wallerstein Debate," 47.

89 Garst, "Wallerstein and His Critics," 470. For a supportive argument see Christopher Chase-Dunn and Joan Sokolovsky, "Interstate System and Capitalist World Economy: A Response to Thompson," *International Studies Quarterly* 27, no. 3 (1983): 357–367

90 Theda Skocpol, "Wallerstein's World Capitalist System: A Theoretical and Historical Critique," *American Journal of Sociology* 82, no. 5 (1977): 1075.

91 Immanuel Wallerstein, "The Rise and Future Demise of the World Capitalist System: Concepts for Comparative Analysis," *Comparative Studies in Society and History* 16, no. 4 (1974): 388.

research based uncritically upon it, but in the theoretical controversies and advances it can spark among its friends.<sup>92</sup>

Skocpol therefore emphasized the value of Wallerstein's work without omitting some of its shortcomings. She criticized a deficiency in the description of the world-system's dynamics that Wallerstein often mentions—although limited to the “market processes: commercial growth, worldwide recessions, and the spread of trade in necessities to new regions of the globe”—but fails to explain in a theoretically clear way.<sup>93</sup> Skocpol also points out that “Wallerstein treats ‘labor control’ primarily as a market-optimizing strategy of the dominant class alone” and thereby omits important elements, e.g., “the sociological key to the functioning and development of any economic system.”<sup>94</sup> One of Skocpol's main points of criticism is Wallerstein's limitation to economic conditions as an explanation for the world-system and the nation-state structures within it.<sup>95</sup> Her final evaluation therefore emphasizes a “teleological assertion”<sup>96</sup> in Wallerstein's methodological approach toward the world-system and argues for more research that would enhance his ideas: “Perhaps we still sense that Wallerstein's vision of an enduring, exploitative division of labor is correct, but in that case the theoretical reasons why it is correct must be found elsewhere than in the market economics and the economic-reductionist political sociology of Wallerstein's own model of the world capitalist system.”<sup>97</sup> Wallerstein's work eventually provided a particular stimulus toward more comparative approaches in historical and sociological studies, and broader comparative studies that tried to analyze larger historical processes and phenomena were written partly as a consequence of the debate his work on the world-system triggered.<sup>98</sup> That Wallerstein's theoretical ideas can still be useful in many different ways is probably the main argument of the present volume,

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92 Skocpol, “Wallerstein's World Capitalist System,” 1076.

93 Ibid., 1078.

94 Ibid., 1079.

95 Ibid., 1080.

96 Ibid., 1088.

97 Ibid., 1087.

98 Charles C. Ragin, *The Comparative Method: Moving Beyond Qualitative and Quantitative Methods* (Berkeley, CA: University of California Press, 1987); Theda Skocpol, “Emerging Agendas and Recurrent Strategies in Historical Sociology,” in *Vision and Method in Historical Sociology*, ed. Theda Skocpol (New York: Cambridge University Press, 1984), 356–391; Charles Tilly, *Big Structures, Large Processes, Huge Comparisons* (New York: Russell Sage, 1984); Wallerstein, “The Rise and Future Demise.”

which intends to show different ways of reading and applying world-systems theory in areas not limited to historical and sociological studies.

## Wallerstein 2.0

“I think of world-systems analysis as a perspective and not as a theory.”<sup>99</sup>

Since 1974, as Binghamton sociologist William G. Martin described it, “world-systems scholarship has ... thrived in book series, journals, universities and professional organizations—creating in the process a world-systems diaspora scattered around the planet.”<sup>100</sup> However, Martin also emphasizes that “[f]or many, particularly sociologists, the world-systems perspective is the victim of its own success. For as ‘globalization’ has been accepted within and across the social sciences and the humanities, world-systems work has, from this point of view, lost its distinctiveness through the acceptance of its globalizing premise.”<sup>101</sup> In contrast to sociology, as American historian Bruce Mazlish remarked, “[t]he historical profession has been slow to appreciate the importance of globalization,”<sup>102</sup> although global and transnational approaches have since gained influence. In fact, world-systems theory can still offer, not only to the historian, an analytical tool that might help as some kind of historical caesura. Beyond showing how “the modern commercial and capitalist world came into existence,”<sup>103</sup> Wallerstein’s world-systems theory offers a way to focus on dependencies beyond the economic sector and can even be applied to look at specific historical problems determined by the dynamics of a world-

99 Wallerstein, *The Essential Wallerstein*, 129.

100 Martin, “Still Partners,” 234.

101 *Ibid.*, 235. See also Charles Tilly, “Macrosociology, Past and Future,” *Newsletter of the Comparative and Historical Sociology Section of the American Sociological Association* 8, no. 1/2 (1995): 1–4; Giovanni Arrighi, “Globalization and Historical Macrosociology,” in *Sociology for the Twenty-First Century: Continuities and Cutting Edges*, ed. Janet Abu-Lughod (Chicago: Chicago University Press, 2000), 117–133.

102 Bruce Mazlish, “Comparing Global History to World History,” *The Journal of Interdisciplinary History* 28, no. 3 (1998): 385. See also Craig A. Lockard, “Global History, Modernization and the World-System Approach: A Critique,” *The History Teacher* 14, no. 4 (1981): 491.

103 *Ibid.*, 387.

system that may differ from Wallerstein's.<sup>104</sup> This does not mean that one can easily omit national histories because “[t]he dynamism of the world economy and state system depend greatly on the absence of centralized world authority (a world state or empire), and global culture is essentially a by-product of hegemony with no causal significance in its own right.”<sup>105</sup> In this regard, world-systems analysis would, in a way, fulfill a central demand of global history, as “[i]ts core concerns are with mobility and exchange, with processes that transcend borders and boundaries. It takes the interconnected world as its point of departure, and the circulation and exchange of things, people, ideas, and institutions are among its key subjects.”<sup>106</sup>

Due to an increased interest in globalization and its accompanying changes and processes, interest in world-systems analysis seems to have gained interest again, although it is still far from the scientific mainstream.<sup>107</sup> National and regional histories can hardly be written, and the respective societies hardly be fully understood, “without reference to these universalizing and globalizing forces”<sup>108</sup> stimulated by transitions or transformations within the world-system. Although there are “limits of Wallerstein's world-system interpretation”<sup>109</sup> in some particular regional contexts, the theoretical approach he suggested can, as some of the contributions of this volume will show, be used beyond the classical macro- and micro-perspectives related to larger systems or nation-states, respectively. The core-semiperiphery-periphery complex—or zemiperiphery, as Stephen Shapiro puts it in his chapter—can be used as an analytical frame that goes beyond historical and sociological understandings of the world. Moreover, it can be used interdisciplinarily to find answers related to all kinds of dynamics and divisions that exist on smaller and larger scales—on this, see Giuditta Bassano's and Sebastian Engelmann's

<sup>104</sup> See, for example, Janet L. Abu-Lughod, *Before European Hegemony: The World System A.D. 1250–1350* (New York: Oxford University Press, 1989).

<sup>105</sup> John W. Meyer, John Boli, George M. Thomas, and Francisco O. Ramirez, “World Society and the Nation-State,” *American Journal of Sociology* 103, no. 1 (1997): 147.

<sup>106</sup> Sebastian Conrad, *What is Global History?* (Princeton, NJ): Princeton University Press, 2016), 5.

<sup>107</sup> Thomas Clayton, “Competing Conceptions of Globalization’ Revisited: Relocating the Tension between World-Systems Analysis and Globalization Analysis,” *Comparative Education Review* 48, no. 3 (2004): 274.

<sup>108</sup> David Washbrook, “South Asia, the World System, and World Capitalism,” *The Journal of Asian Studies* 49, no. 3 (1990): 482.

<sup>109</sup> Stern, “Feudalism, Capitalism, and the World-System,” 831.

contributions in particular. Cultural systems, even on regional and national scales, might show divisions that match Wallerstein's division of the world-system—for instance, James Horncastle's contribution relates to a world-system of migration. It consequently seems important to identify these divisions, although they might overlap or even replicate the larger divisions within an existent world-system.

Although, as Thomas Clayton argued, “[t]he recent excitement about globalization in the scholarly community and the general acceptance of globalization as an orienting concept for studies in myriad domains could be seen as an important validation for that group of scholars who have for decades recognized the existence of an integrated world-economy operated by a single division of labor and who have worked diligently to understand how multiple phenomena both effect and are affected by this formation,”<sup>110</sup> world-systems analysis is often limited in the sense that it is often applied to explain economic development and dynamics, e.g., an “endless commodification,”<sup>111</sup> while “certain globalization scholars have carefully positioned world-systems analysis as fundamentally different from, and therefore not affirmable by, their own approach.”<sup>112</sup> Regardless of the fact that “transnational corporations are maintaining today the same structural stance vis-à-vis the states as did all their global predecessors, from the Fuggers to the Dutch East India Company to nineteenth-century Manchester manufacturers”<sup>113</sup> and that, as a consequence, the world-system dynamics Wallerstein described are still at play, the theoretical use of world-systems-analysis, as mentioned before, could and should go much further.

Wallerstein himself emphasized that “[w]orld-systems analysis is not a theory about the social world, or about part of it. It is a protest against the ways in which social scientific inquiry was structured for all of us at its inception in the middle of the nineteenth century.”<sup>114</sup> Furthermore, it “was born as a moral,

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<sup>110</sup> Clayton, “Competing Conceptions of Globalization’ Revisited,” 276.

<sup>111</sup> Jason W. Moore, “Ecology, Capital, and the Nature of Our Times: Accumulation and Crisis in the Capitalist World-Ecology,” *Journal of World-Systems Research* 17, no. 1 (2011): 107–146.

<sup>112</sup> Clayton, “Competing Conceptions of Globalization’ Revisited,” 276. See also Leslie Sklair, “Competing Conceptions of Globalization,” *Journal of World-Systems Research* 5, no. 2 (1999): 143–162.

<sup>113</sup> Immanuel Wallerstein, “Response: Declining States, Declining Rights?” *International Labor and Working-Class History* 47 (1995): 24.

<sup>114</sup> Wallerstein, *The Essential Wallerstein*, 129.

and in its broadest sense, political protest,”<sup>115</sup> and its “basic logic is that the accumulated surplus is distributed unequally in favour of those able to achieve various kinds of temporary monopolies in the market networks.”<sup>116</sup> Wallerstein attempted to explain inequality and provide a theoretical analysis that would make us understand the roots of such existent inequalities around the globe. For him, “the ‘modern world-system’ was born out of the consolidation of a world economy. Hence it had time to achieve its full development as a capitalist system. By its inner logic, this capitalist world economy then expanded to cover the entire globe, absorbing in the process all existing mini-systems and world empires.”<sup>117</sup> In this regard, I would argue, he was successful, and many studies have shown how globalization, accompanied by an accumulation of capital and an exploitation of diverse peripheries (geographical and otherwise), shaped the inequalities we still face today. Wallerstein’s theoretical approach also allows an understanding of global problems from a broader and transnational perspective, offering a wider focus for a critical analysis of the world as a whole.<sup>118</sup>

Regardless of this wider analytical perspective, world-systems theory does not neglect regional or national developments: “global comparisons do not erase regional frames, they reinvent them.”<sup>119</sup> In fact, there is all the more reason to apply world-systems analysis further because “[s]ocial science is a product of the modern world-system, and Eurocentrism is constitutive of the geoculture of the modern world.”<sup>120</sup> For the “godfather” of world-systems theory, it was obvious that “if social science is to make any progress in the 21st century, it must overcome the Eurocentric heritage which has distorted its analyses and its capacity to deal with the problems of the contemporary world.”<sup>121</sup> At the same time, world-systems theory should be decentralized, meaning that one should apply it as a theoretical frame to questions of human societies beyond a purely economic perspective. There are other cores, semiperipheries, and peripheries beyond the world-systems and nation-states that have been debated before, and in addition to thinking about Wallerstein’s

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<sup>115</sup> Ibid.

<sup>116</sup> Ibid., 139–140.

<sup>117</sup> Ibid., 140.

<sup>118</sup> Aronowitz, “A Metatheoretical Critique,” 504; Vratuša Žunjić, “In Memoriam,” 1340.

<sup>119</sup> Vanhaute, “Immanuel Wallerstein’s Lasting Impact.”

<sup>120</sup> Immanuel Wallerstein, “Eurocentrism and Its Avatars: The Dilemmas of Social Science,” *Sociological Bulletin* 46, no. 1 (1997): 21.

<sup>121</sup> Ibid., 22.

theory along geographical lines, it probably also makes sense to open the framework to other approaches. The 21st century is a globalized one, yet it is no less complex than the 20th century with regard to the functionality of its world-system(s). Wallerstein's quest will consequently continue through further widening his perspectives to find new ways to apply his thoughts. The contributions in this volume try to show how this endeavor can be undertaken in different fields and with interesting new foci. If we intend to better understand the world, we should not stop with Wallerstein but continue the path he tried to pave with his ideas.

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