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Critiques and developments in world-systems analysis: an introduction to the special collection[1]

Richard E. Lee

Abstract: From its inception, the world-systems perspective was not only enormously influential in long-term, large-scale social research; it also attracted a set of serious critiques. These fell into the general areas of the emergence of the capitalist world-economy; reductionism in the mode of argument; surplus appropriation and accumulation, including the question of class; and the general exclusion of an analysis of any role for "culture." It is concrete developments in world-systems analysis over the past three decades, although not to the exclusion of explicit responses to critiques, that have gone a long way in addressing these concerns. They fall most notably into the areas of commodity chains, households, world-ecology, and the structures of knowledge.

Keywords: world-systems analysis, critiques of world-systems analysis, Immanuel Wallerstein, commodity chains, households, world-ecology, structures of knowledge

World-systems analysis[2] emerged in the 1970's. As a knowledge movement, it was related to the decline in the world economic expansion that had been operative over the preceding quarter century and the end of the period of hegemony in the interstate system over the same period that had been characterized by the post-Second World War dominance of the United States. World-systems analysis was a product of the system that it sought to understand, but it was also a protest or resistance movement within the structures of knowledge and owed much to the social movements of 1968.

World-systems analysis is premised on the idea that historical social systems have lives. They come into being as a unique and indivisible set of singular, long-term, or *longue durée*, structures, which are reproduced as secular trends with cyclical rhythms that may be observed over the life of the system (see Goldstein 1988; Wallerstein 1984). Eventually, however, these processes of reproduction run up against asymptotes, or limitations, in overcoming the contradictions of the system and the system ceases to exist. World-systems analysis specifies its unit of analysis as an entire historical system, holding that historical social systems are singular entities, and that indeed, the modern world-system is not only a singular whole (that is, its "parts," such as the states, are not independent or autonomous, but only exist in relation to one another with specific systemic functions) but is also unique in human history as having expanded to incorporate the entire globe.

The structures of the modern-world system, or capitalist world-economy, emerged in Europe at the beginning of the long sixteenth century, the period known as the "transition from feudalism to capitalism." An axial (hierarchical) division of labor (the primary world-scale structure in the arena of production and distribution) developed between a western European core where high-wage, skilled workers produced low-bulk, high value-added manufactures and, initially, an eastern European periphery where high-bulk, low value-added necessities were produced by a lower-cost work force. The long-distance trade in these commodities resulted in the accumulation of capital in the Western European core.

Fluctuating flows of goods, capital, and labor have moved across semi-permeable borders throughout the system over the entirety of its lifetime. In practice, strong states worked to loosen controls during periods of world economic upturn and tighten controls during periods of downturn to favor accumulation (along with its concentration and centralization) and contain and defuse class conflict. Accumulation actually amounted to the "accumulation of accumulation" or profit making for reinvestment and thus more profit making and the expansion of the system to incorporate new pools of low-cost labor was fundamental to turning periods of world economic contraction into periods of renewed growth. Today, significant pools of labor outside the system to be incorporated at the bottom of the wage hierarchy to take the place of previously incorporated workers who have militated and succeeded in negotiating higher remuneration no longer exist. The result constitutes a challenge to capital in maintaining the world-scale rate of profit (see Hopkins and Wallerstein 1987).

The “endless” accumulation resulting from the extraction and appropriation of surplus produced by labor and its subsequent reinvestment could only take place within the context of what developed as an interstate system (the primary world-scale structure in the arena of coercion and decision making) that, at least partially, controlled flows throughout the system. Like its economic processes, the geopolitics of this system also underwent periodic fluctuations. Competition among elites resulted in “world wars,” the outcomes of which were short-lived states of “hegemony,” a status of the system (not an attribute of a single state) during which one strong state exercised supremacy, before other parts of the world-system “caught up” to become once more competitive and the cycle repeated (see Arrighi 1990 and Wallerstein 1983b).

There was a third set of structures that were just as constitutive of the modern world-system as those in the arenas of production and distribution and coercion and decision making, that is, the structures of knowledge, which organize the arena of cognition and intentionality—at the most basic level, the divorce of facts from values in knowledge production, epitomized in the division of the sciences and the humanities. The structures of knowledge govern what actions may be deemed legitimate and effective, and therefore what actions will actually be undertaken by social agents; the structures of knowledge are thus fundamental to accumulation in the way they favor consensual relations over more costly coercion (see Lee 2007, 2010).

Serious critiques of the world-systems perspective as originally set out by Immanuel Wallerstein were advanced early on. Among the most important of those issues were: the way the emergence of the capitalist world-economy was handled; a perceived reductionism in the mode of argument; the treatment of how surplus was appropriated and accumulated, including the question of class; and the general exclusion of an analysis of any role for “culture” with the associated concern for what seemed to some the Eurocentricism of the project.

Many cited the lack of a theory to account for the triumph of the European world economy in the sixteenth century as a major shortcoming. Stanley Aronowitz wrote that “Wallerstein leaves us with the impression that change is a function not of the internal contradictions of a system but of pure contingency ... [that] challenge[s] the very notion of causality in social and historical process” (1981: 508). Aristide R. Zolberg deplored the attempt “in vain to demonstrate causal precedence” of changes in economic or political

organization (1981: 275) and Theda Skocpol had misgiving about the degree to which world-systems analysis was "explanatory" (1977: 1081), musing that "through his [Wallerstein's] a posteriori style of argument, deviant historical cases do not force one to modify or replace one's theory, while even a very inappropriate model can be illustrated historically without being put to the rigorous test of making real sense of actual patterns and causal processes in history" (1977: 1088). Michael Hechter, although in a positive reference, alluded to serious students wrestling with "its hypotheses, to operationalize them, to test them" (1975: 218); but this is exactly the model of nomothetic social science that, given the premises of the world-systems perspective, would have to be overcome.

In fact, the early charges of reductionism and the criticism of the mode of inquiry in general have persisted. As Skocpol had asserted,

the model is based on a two-step reduction: first, a reduction of socio-economic structure to determination by world market opportunities and technological production possibilities; and second, a reduction of state structures and policies to determination by dominant class interests ... ignoring the basic Marxist insight that the social relations of production and surplus appropriation are the sociological key to the functioning and development of any economic system ... Wallerstein treats "labor control" primarily as a market-optimizing strategy of the dominant class alone (1977: 1078-9).

For Zolberg, the reductionist tendency of the project was evident in "viewing political processes as epiphenomenal in relation to economic causation" (1981: 255); and as Anthony Giddens wrote: "Wallerstein's arguments involve an uncomfortable amalgam of functionalism and economic reductionism" (1985: 167). The issues of class and market reductionism came together in Robert Brenner's frontal attack on the lines of argument epitomized in the work of Paul Sweezy, André Gunder Frank and Wallerstein. Extending the position taken by Laclau in his critique of Frank, he wrote that "'production for profit via exchange' will have the systematic effect of accumulation and the development of the productive forces only when it expresses certain specific social relations of production, namely a system of free wage labour, where labour power is a commodity" (1977: 32).

In 1992, in "The West, Capitalism, and the Modern World-System," Wallerstein explored the combination of issues from the point of view of why the transition to capitalism (with largely negative consequences, in his view) happened at all;

was it "intrinsically necessary or historically 'accidental'" (1992: 563). In a wide-ranging analysis that includes questions of politics and the production of knowledge, he stipulates that if we

find that as late as 1300+ there was no reason to expect that the qualitative changes that would occur 200 years later were built into long-standing historical trajectories, but rather were "conjunctural," we are freer to appraise the wisdom of the historical choices that were made, and are liberated from the self-fulfilling and self-congratulatory qualities of the "civilizational" explanation[s ... that tend to assume that the developments were somehow inevitable (1992: 590, 599).

The four elements of an explanation that he investigates, "emphasizing in each the particular conjunctural 'exaggeration' of a long-standing trend" are the collapse of the seigniors, of the states, of the Church, and of the Mongols. Brenner had faulted Wallerstein for what he considered the mistaken direction of causation, interpreting Wallerstein's argument as contending that "the system of free wage labor ... is derivative from ... the emergence of the capitalist world economy in the sixteenth century" (1977: 33). Wallerstein's clarification makes plain his structural understanding of the mechanisms at work in terms of the coincident combination or fortuitous simultaneity of the lifting of a set of constraints: the removals of limits on preexisting "capitalist skills and methods" that up until that time had been "rejected for fear of the long-term consequences of utilizing them" (1992: 613). Conceptually, this conjunctural argument is one of determinant conditions, which admits the contingency of historical change, that is, an alternative framework of understanding to the model of classical causation which a number of commentators had found lacking.

Analysts have generally asserted the holism of the world-systems project by alluding to its single unit of analysis as a totality. But substantively, even here some have argued for a different specification of the unit itself. The interrelated trade network that Frank discusses as a five thousand year old "world system" (see Frank 1990 and Frank and Gills 1993), Wallerstein does not believe to have at any time been based on an axial division of labor. The crucial distinction is between a geographic trade network in luxury goods versus an integrated division of labor where, for instance, the social relations of production in one zone have been realigned to concentrate on the production of necessities for consumption in another zone, the two thus comprising a relational system "a system 'that is a world.'" Nor, argues Wallerstein, has any previous historical system been "'capitalist' in that none of them was based on the structural pressure

for the ceaseless accumulation of capital." The actual thrust of Wallerstein's argument combines the observation, which many shared, that "something distinctive occurred in (western) Europe which was radically new somewhere in early modern times" with the idea that it was not true that this "something" was a highly positive or 'progressive' happening," which many did not share (1993b: 294, 292). This then was also an argument against those who faulted world-systems analysis for some alleged western triumphalism or Eurocentricism:

Far from Eurocentric, my analysis "exoticizes" Europe. Europe is historically aberrant. In some ways this was a historical accident, not entirely Europe's fault. But in any case, it is nothing about which Europe should boast. Perhaps Europe and the world will one day be cured of this terrible malady with which Europe (and through Europe the world) has been afflicted (Wallerstein 1993b: 295).

Two specific conceptual developments and the empirical studies that have put them into practice have further addressed not only the putative reductionism(s) of the world-systems approach but the handling of accumulation and the question of class as well. We may refer to these in shorthand as commodity chains and households.[3] Reconceptualizing economic models at the macro level in terms of commodity chains and the axial division of labor counters ideas about the independent development of national economies and gives a fundamental role to political actors (in the widest sense, not just "elites"); at the micro level the move to household units shifts the emphasis away from individual wage labor as the single locus of surplus production leading to capital accumulation, indeed, as the defining characteristic of "capitalism," and recognizes the function of production and reproduction of value contexts in shaping the relationship between labor and capital and thus how the struggle over benefits plays out.

Trade over long distances is not unique to the capitalist world-economy, but this was trade between one market and another with significant differentials in prices and information and not governed by common calculations, or even conceptions of profit and loss. Today markets "are said to be 'world markets,' in the sense that the sellers and buyers take into account alternatives that are located throughout this 'world market'—of course, to the extent of their effective knowledge." Items meant for direct consumption are "in fact the outcome of a long series of production processes we shall call a commodity chain"; these are typically "geographically extensive and contain many kinds of production units

within them with multiple modes of remunerating labor.” Such trans-state chains have been an integral part of the historical function of the capitalist world-economy (Wallerstein 2000b: 2). Commodity chains evidence the actual process through which the axial division of labor functions and

demystify the overused category of exchange. Exchanges are nothing but the prices paid for moving items along a chain of production processes, and thereby moving as well a part of the surplus-value. They are not a separate process. There can be no production of commodities without moving the inputs along a chain. The prices in any box are not autonomous; they are conditioned by the prices in the chain as a whole. Because of the reality of vertical integrations and the reality of the constant interventions of the states in the axial division of labor, prices in any box are a function of complex decision-making by a series of actors including, but larger than, the owners of enterprises within the box (Wallerstein 2000b: 11-12).

Thus capital is accumulated not through an untidy hodgepodge of everything bought and sold, including labor-power, but rather through specific sets of serial operations that are accomplished across multiple political borders and cultural frontiers, at every node of which political and cultural pressures are brought to bear by all of the concerned parties to maximize their interests—in general, but not exhaustively, capital seeks to maximize surplus appropriation and labor attempts to hang on to as much of the surplus as possible. Although contentions among alternative world views may result in surprising, historically specific and counterintuitive outcomes in the short or medium term, viewed from the macro or system level, accumulation remains nonetheless an irreducible amalgam, both an economic and a politico-cultural process, situated in these chains of specifically and differentially constrained exchanges.

At the micro level—where the reproduction of the work force cannot be separated from socialization into particular sets of cultural, religious, moral and ethical values, political principles, and approaches to racial, ethnic, and gender roles—“households,” not the individual, are the “appropriate operational unit for analyzing the way in which people fit into the ‘labor force.’” They are “defined for these purposes as the social unit that effectively over long periods of time enables individuals of varying ages of both sexes, to pool income coming from multiple sources in order to ensure their individual and collective reproduction and well-being.” The five forms of household income are “wages, market sales (or profit), rent, transfer and ‘subsistence’ (or direct labor input)” (Wallerstein and Smith 1992: 13, 7). The particular mix of these activities, then,

determines to a large degree the price of labor power at a specific time and place that the household can, or is willing to, accept as a wage and therefore the relative surplus value that may be produced at any point on a commodity chain (by altering the composition of capital).

In her "Nonwaged Peasants in the Modern World-System: African Households as Dialectical Units of Capitalist Exploitation and Indigenous Resistance, 1890-1930," Wilma A. Dunaway uses the "household" model in her examination of the mechanisms of labor exploitation of the four major colonizers in Africa using case studies and oral histories to access colonial land and labor policies. This study concludes that colonial Africans should be regarded as living in *mixed livelihood households*, in which nonwaged labor forms (both free and unfree) predominate, with very little likelihood of future transition to household dependency upon wages. Thus, wage earning is not the primary mechanism through which these households are integrated into the axial division of labor of the modern world-system. Instead, these households primarily provide nonwaged labor to capitalist commodity chains through which surplus is extracted and costs of production are externalized to them.

Jason Moore, too, is concerned with the lower rungs of the commodity chains of the capitalist world-economy. His "'This Lofty Mountain of Silver Could Conquer the Whole World': Potosí and the Political Ecology of Underdevelopment, 1545-1800," shows how by the 1570's, Potosí, and its silver, had become the hub of a commodity revolution that reorganized Peru's peoples and landscapes to serve capital and empire. This study joins the concept of "commodity frontiers" with an investigation of, again, how the complex intermingling of free and unfree labor contribute to maximize surplus extraction and accumulation—but with varying results only explicable as a consequence of the articulation of local circumstances and world-scale processes. Indeed, for Moore, this was a decisive moment in the world ecological revolution of the long seventeenth century. Historical capitalism has sustained itself on the basis of exploiting, and thereby undermining, a vast web of socio-ecological relations. However, as Moore observes in colonial Peru, the commodity frontier strategy effected both the destruction *and* creation of premodern socio-ecological arrangements.

At the opposite end of the commodity chains of the modern world-system, the commanding heights of capitalist enterprise, Florence Molk examines the

trajectory of one leading industry. In her "The Rise, Maturity and Geographic Diffusion of the Cotton Industry, 1760-1900," she is most interested in the establishment, maintenance, and eventual decline in the profit rates of a single sector, the cotton industry, including calico printing, over the period 1760-1900. From its beginnings in England as a leading industry of the capitalist world-economy, the industrial production of cotton textiles spread geographically on a major scale to finally reach the United States and Japan. As Molk demonstrates, over the long term, as it expanded and competition increased, profit rates tended to fall, although unevenly. The question opened up by this research is whether it can be shown that successive leading industries have declined in average profit rates, and thus whether the long-term rate of profit in the capitalist world-economy has undergone secular decline.

Beyond the relation between capital and labor, class is also a historically specific, lived relation that is "made." As many commentators have suggested, the production of goods or commodities is intimately associated with the production of meaning. Extending this line of argument, then, wage labor must no longer be viewed as an either/or category. Most all workers are semi-proletarians or part-lifetime proletarians (see, e.g., Dunaway, this collection). They exhibit varying degrees of proletarianization depending on the household structure of which they are a part, much as states exhibit a range of degrees of sovereignty in the interstate system (see, e.g., Wilson, his collection) and it is preferable for employers to engage persons less rather than more dependent on wage income in order to maximize surplus production. We should also keep in mind that, as Wallerstein has written, "constructed 'peoples'—the races, the nations, the ethnic groups—correlate ... albeit imperfectly, with 'objective class' ... a very high proportion of class-based political activity in the modern world has taken the form of class-based political activity" (1987: 387).

The construction and reproduction, and contestation, of status categories (i.e., in terms of identities, such as racial/ethnic, gender, or national) inscribing groups into a hierarchical, axial, world division of labor, the political superstructure of the interstate system, and the household structures integrating non-wage labor, according to attributed characteristics and thereby shaping class action, poses the problem for world-systems analysis of conceptualizing culture or cultural forms and their legitimation as a long-term process of historical capitalism. The cultural question has been a recurrent point of contention in critiques of world-systems analysis—for Morris Janowitz, "[Wallerstein] attributes little or

no importance to cultural values or even to institutional structures of Western Europe" (1977: 1093); and from Aronowitz, a protagonist of cultural studies, Wallerstein does "not explore the specificity of politics and culture within the underclasses to find out how and why they acted, or whether their actions severely modified or constituted an aspect of the determination of the direction of history" (1981: 516-17).

Here too specific developments within the field have addressed the issues. The traditional approaches to the problem— culture as either the elitist culture or not-culture, or the particularistic and relativistic perspective to cultures in the plural, often with an exclusionary function— have given way to a conceptualization of the long-term question of how we (whoever "we" are!) know what we think we know and thus what it is we think we as social agents can justifiably and efficaciously do. World-systems analysis has shifted the terms in discussions of culture to one of a structure, and the processes of its reproduction, that has come to be seen as equally constitutive of the modern world and to be conceptualized in ways analogous to the axial division of labor and the interstate system. This structure has come to be known as the structures of knowledge.

This collection, then, offers two studies that incorporate the structures of knowledge approach by relating developments in the history of ideas to contemporary developments in the material structures of the modern world-system.

Eric Wilson discusses the historical and textual representations of piracy in the writings of Hugo Grotius, primarily *De Indis/De iure praedae* (1603-1608) and the *Commentarius in Theses XI* (c. 1600). Contrary to popular belief, Grotius, in contrast to Jean Bodin, was not an advocate of the constitutionally homogenous nation-state. Rather, his central concept of divisible sovereignty unambiguously presents the object of the heterogeneous state. In Grotian theory, the state may be "read" as a composite construction, with a residual degree of inalienable sovereignty accruing at each unit-level. Even if only unconsciously, Grotius describes a concurrent para-political sub-division of the state between institutional government (the "magistrates") and civil society, one that constitutes an operational system of governance within the nation-state. Grotius' theory allows, according to Wilson, for the emergence of a wholly "private," albeit lawful, mode of authority. This is most apparent in Grotius' treatment of

the mercantile trading company and its privateering operations. The corporatist theory of sovereignty permits the company's private agents of violence, the legally ambivalent privateer/pirate, to be invested with a requisite degree of sovereignty. The Grotian theory of divisible sovereignty, investing the seventeenth-century pirate band with legal personality, serves as a vital historical precursor to the quasi-statist (trans-) national criminal cartels of the twenty-first century.

Sanem Güvenç-Salgirli argues that the historiographical approaches prevalent in the Ottoman Empire and then in the Turkish Republic, observable in both academic and cultural production and implemented in the education system, were closely related to material life and governance of the two regimes. Furthermore, they were transformed along with the passage from one regime to the other. Just the same and consistent with the structures of knowledge approach, the debates remained surprisingly similar. It is further shown, however, and again in accordance with the structures of knowledge approach, that these relations were not of a one-way causality in either direction, but rather part of a singular whole, in this case part and parcel with ("negotiated") incorporation into the capitalist world-economy. Not surprisingly, debates generally over the construction of the past deployed in the making of the present and particularly over the modernization project survive today in discussions arising from Turkey's possible candidacy for membership in the European Union.

Endnotes

[1] Some of this material has appeared previously in Lee (2010, ch. 1).

[2] See especially: the three volumes of Immanuel Wallerstein's *The Modern-World System* (1974, 1980, and 1989) and the articles collected in *The Essential Wallerstein* (2000a); for an overview, consult Wallerstein (1983a); for an introduction that includes both the origins and the development of the world-systems perspective, Wallerstein (2004) is a good start; for some still relevant thoughts on methods, see the essays in Hopkins, Wallerstein, et al. (1982). See Wallerstein (1993a) for an explanation of the significance of the hyphen; for examples of work in which the concept is not hyphenated, see, for instance, essays in Denmark, Friedman, Gills, and Modelsky (2000).

Lee, Richard E. (2010) 'Critiques and developments in world-systems analysis: an introduction to the special collection', *The Journal of Philosophical Economics*, IV:1, 5-18

[3] On commodity chains, the special issue of *Review*, XXIII, 1 (2000) includes two substantive studies, one on shipbuilding and one on grain flour, besides a conceptual overview; see also Gereffi and Korzeniewicz (1994). On conceptualizing and studying households, see Smith and Wallerstein (1992); besides an introduction to the approach, it contains eight substantive studies divided among the United States, Mexico and South Africa.

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