

Oxford Bibliographies in International Relations: World-System Theory

Christopher Chase-Dunn and Marilyn Grell-Brisk

Institute for Research on World Systems, UC Riverside

Introduction

Precursors

Dependency Theory

Emergence of the World-Systems Perspective

Elaborators I, II

Critics

Global Commodity and Value Chains

International Relations Theory and the World-Systems Perspective

Women and Gender

Racism, Ethnogenesis, and Slavery

Hegemonic Rise and Fall and Global Social Movements

Ecology, Environment and Climate Change

Regional Applications: Africa, Latin America, Asia

Introduction:

The world-system perspective emerged during the world revolution of 1968 when social scientists contemplated the meaning of Latin American dependency theory for Africa. Immanuel Wallerstein, Terence Hopkins, Samir Amin, Andre Gunder Frank and Giovanni Arrighi developed slightly different versions of the world-system perspective in interaction with each other. The big idea was that the global system had a stratified structure on inequality based on institutionalized exploitation. This implied that the whole system was the proper unit of analysis, not national societies and that development and underdevelopment had been structured by global power relations for centuries. The modern world-system is a self-contained entity based on a geographically differentiated division of labor and bound together by a world market. In Wallerstein's version capitalism had become predominant in Europe and its peripheries in the long 16th century and had expanded and deepened in waves. The core states were able to concentrate the most profitable economic activities and they exploited the semiperipheral and peripheral

regions by means of colonialism and *unequal exchange*. The world-system analysts all focused on global inequalities, but their terminologies were somewhat different. Amin and Frank talked about center and periphery. Wallerstein proposed a 3-tiered structure with an intermediate *semiperiphery* between the core and the periphery, and he used the term “core” to suggest a multicentric region containing a group of states rather than “center”, which implies a hierarchy with a single peak. When the world-system perspective emerged, the focus on the non-core (periphery and semiperiphery) was called Third Worldism. Current terminology refers to the Global North (the core) and the Global South (periphery and semiperiphery).

Amin, Samir. 1974. *Accumulation on a World Scale: A Critique of the Theory of Underdevelopment. Volume 1 and 2*. New York: Monthly Review Press.

Through a critique of underdevelopment theories, Amin demonstrates how capital accumulation in advanced economies prevents development in peripheral countries.

Arrighi, Giovanni. 1978. *The Geometry of Imperialism*. London: New Left Books.

This text presents imperialism not as a primarily economic phenomenon or a form of colonial rule, but rather as a struggle for world hegemony.

Hopkins, Terence K. 1979. "The Study of the Capitalist World-Economy: Some Introductory Considerations" in *The World-System of Capitalism: Past and Present*, edited by Walter Goldfrank. Beverly Hills: Sage Publications

This book chapter highlights Hopkins' contribution to the formulation and development of the world-systems perspective.

Frank, Andre Gunder. 1978. *World Accumulation, 1492-1789*. New York: Monthly Review Press

In this work, Frank discusses capital accumulation and the cyclical processes of expansion, crisis and transformation leading to development and underdevelopment.

Wallerstein, Immanuel. 1974. *The Modern World System: Capitalist Agriculture and the Origins of the European World-Economy in the Sixteenth Century, Vol. 1*. New York: Academic Press.

This is the seminal work on the world-systems perspective.

Precursors:

Karl Marx's theory of the contradictions of capitalist development was expanded by the world-system theorists to a global scale. While Marx focused mainly on capitalist industrialization and class relations within core European states, the world-system perspective saw the core/periphery hierarchy as a central structure for capitalism. What had occurred in the non-core was peripheral capitalism and it was necessary for the reproduction and deepening of capitalism. Marx had defined capitalism commodity production based on wage labor. The world-system theorists have argued that modern slavery and serfdom were forms of peripheral capitalism. The Marxist view of modern societies in constant tension between the owners of the means production (capitalists) and labor (workers/proletariat) resulting in class conflict is expanded to the whole system, except that labor relations in the non-core involve a greater degree of coercion. World-system analysis is a significant modification of traditional Marxist principles that includes the non-core as a systemic aspect of capitalism. Lenin's theory of imperialism as a stage of capitalism was rewritten to emphasize the importance of imperialism as a systemic feature of capitalist development since the emergence of the modern core/periphery hierarch in the 16th century. Bukharin's discourse on imperialism on capitalism and world economy was an important precursor that focused on flows of value from peripheral/colonial countries to the core capitalist countries. While Lenin saw this relationship of extreme exploitation (imperialism) by the core of the non-core in the capitalist system as the "highest stage" of capitalism, world-systems analysts view imperialism as a central feature of capitalism's constant, though evolving structure of inequality. Although cycles in production have always existed, for world-system analysts, economic cycles are endemic to the modern capitalist system. The world-economy cycles through periods of growth and expansion (A-phase) and periods of stagnation (B-phase)

which, is primarily explained through the work of Nikolai D. Kondratieff, Joseph Schumpeter and later Ernest Mandel. The Kondratieff long waves or K-waves, which last from 40 to 60 years, are driven by the appearance of new technologies leading to economic expansion and their exhaustion leading to periods of slow growth. Karl Polanyi's depiction of cycles of marketization followed by periods of reregulation was also an important influence on world-system theorists. Fernand Braudel's focus on the long-term structures of historical development and the importance of cities, agriculture and climate in the interaction networks of the Mediterranean Sea was another major influence of the emergence of the world-system perspective.

Braudel, Fernand 1972 *The Mediterranean and the Mediterranean World in the Age of Philip II*. New York: Harper and Row, 2 vol.

This text is a major influence on the world-systems perspective given its focus on long-term structures of historical development.

Bukharin, Nikolai [1929] 1972 *Imperialism and World Economy*. New York: Monthly Review Press.

An important precursor to the world-systems perspective, this is a study of the internationalization of capital and examines the flow of value from the colonies and peripheral countries to the core states.

Emmanuel, Arghiri. 1972. *Unequal Exchange: A Study of the Imperialism of Trade*. New York: Monthly Review Press.

This book is an examination of unequal exchange – the maintenance of core position through wage suppression in the periphery – a key aspect of world-system structure.

Kondratieff, Nikolai D. 1935. "The Long Waves in Economic Life." *The Review of Economic Statistics* 17(6):105–15.

This article explains economic cycles of growth, expansion and stagnation endemic in the world-system.

Lenin, Vladimir I.[1916] 1939. *Imperialism, The Highest Stage of Capitalism*. New York: International Publishers.

A precursor to world-systems analysis, this book discusses imperialism as the highest stage in capitalism particularly because of the level of exploitation of peripheral/colonial countries by the core.

Mandel, Ernest. 1975. *Late Capitalism*. London: New Left Books.

This book serves as a history of capitalism and its expansion through unequal exchange.

Marx, Karl. [1867] 1967. *Capital I*. New York: International Publishers.

An essential text to understanding class relations.

Polanyi, Karl. 1944. *The Great Transformation: The Political and Economic Origins of Our Time*. New York: Rinehart & Company, Inc.

This book presents the development of the modern market society, with cycles of expansion, followed by periods of reregulation.

Schumpeter, Joseph A. [1939] 2006. *Business Cycles: A Theoretical, Historical, and Statistical Analysis of the Capitalist Process*. Mansfield Centre, Connecticut: Martino Pub.

In this book of economic history analyzes the critical role of innovation with regards to economic cycles and transformation.

Wallerstein, Immanuel. 2000. "Oliver C. Cox As World-System Analyst." *Research in Race and Ethnic Relations*. 11: 173-183.

This article explains how Cox works on development of race and class relations informed the notion of peripheral capitalism in world-systems analysis.

Dependency Theory

The world-systems perspective is a direct outgrowth of the dependency theory school of thought which, was an important critic of the dominant modernization theory in social science. Modernization theorists saw a largely linear trajectory from backwardness (poor/peripheral countries) to modernization (rich/core countries) with any in-between period as transitory. As far as modernists were concerned, the path to core-ness was directly through industrialization, which could be attained through transfers of technology and/or direct capital investment. This meant opening up their economies to foreign investment and adopting institutions that would promote the development of commodity production. Dependency theory, emerged out of the United Nations Economic Commission for Latin America (UN ECLAC) discourse led by Raúl Prebisch. It understood the lack of development in the non-core as based on the exploitative nature of core/periphery relations. The center (core) exploited those at the periphery for natural resources and raw materials, even during the post decolonization period. Samir Amin argued that industrialized countries (core) took advantage of the raw materials of poor countries and maintained their advantages via unequal exchange. Anibal Quijano's study of underdevelopment in Peru is a quintessential example of dependency theory. According to dependency theory, core countries maintain their global advantages because of this structure and therefore the lack of progress was a by-product of this global hierarchy. The relationship between core and periphery engendered what Andre Gunder Frank called "the development of underdevelopment". For Paul Baran, a Marxist economist, the monopoly capitalism of the advanced capitalist countries allowed them to remain in the core and prevented economic development in "backward" countries. Theotonio dos Santos maintained that in the world economy the advancement and preservation of development in dominant (core) countries was at the expense of the dependent ones (peripheral countries) and causing their non-development. Brazilian sociologist Fernando Henrique Cardoso and Enzo Faletto contended that some situations of dependency allowed for certain kinds of development such as dependent capitalist development. Cardoso later became president of Brazil, helping to implement a neoliberal restructuring of the Brazilian economy.

Amin, Samir. 1977. *Imperialism and Unequal Development*. New York: Monthly Review Press.

This book discusses the exploitative, imperialist nature of the core-periphery relationship.

Baran, Paul A. 1957. *The Political Economy of Growth*. New York: Monthly Review Press.

Baran's book on monopoly capital is an important work on the theory of dependency in early development studies.

Cardoso, Fernando Henrique, and Enzo Faletto. 1979. *Dependency and Development in Latin America*. Berkeley: University of California Press

This text examines the stages of development in Latin America including its dependence on international markets.

Dos Santos, Theotonio. 1970. "The Structure of Dependence." *The American Economic Review* 60(2):231–36.

In this article, the author provides a detailed explanation of the underdevelopment of Latin America and is a foundational text on dependency theory.

Gunder Frank, Andre. 1966. "The Development of Underdevelopment." *Monthly Review - An Independent Socialist Magazine* 18(4).

The concept of "development of underdevelopment," the basic principle of dependency theory and development studies as a sub-discipline is in this text.

Gunder Frank, Andre. 1978. *World Accumulation: 1492-1789*. New York: Monthly Review Press.

This text examines the idea of capital accumulation as one continuous process that included the pre-industrial capitalist societies and generated particular types of

economic cycles.

Gunder Frank, Andre. 1979. *Dependent Accumulation and Underdevelopment*. New York: Monthly Review.

Gunder Frank expands on the idea of development of underdevelopment, demonstrating that underdevelopment was a by-product of the modern capitalist order.

Prebisch, Raul. 1950. *The Economic Development of Latin America and Its Principal Problems*. New York: United Nations.

A very influential and one of the first text on dependency as a product of the structure of the political economy of the world system.

Quijano, Anibal. 1967. "Tendencies in Peruvian Development and the Class Struggle." in *Latin America: Reform Or Revolution*, edited by J. Petras and M. Zeitlin. New York: Fawcett.

This article is a case study in which we observe how development or non-development is shaped by the core.

Emergence of the World-Systems Perspective:

Heavily influenced by dependency theory, and coming through the Annales school which focused on the long-term view of history and integrated social science as emphasized by Fernand Braudel, the world-systems perspective maintained that exploitation of non-core countries by the core countries was both a definitive and necessary marker of the modern world-system. A key moment occurred when Wallerstein realized that Poland had been peripheralized in the long 16th century by the rise of core capitalism in Western Europe. Immanuel Wallerstein argued that the missing part of the dependency formula was the semi-periphery – a group of countries that were neither core nor periphery. This group of countries were not in a transitional state between modernity/developed and backwards/underdeveloped. The idea of the semiperiphery is one of Wallerstein's most important analytic contributions to the world-system perspective. The semiperiphery is a

stabilizing fixture of the world-system, engaging in equal amounts of core and peripheral activities, benefiting just enough from the global commodity chains to avoid falling into the periphery but not quite enough to rise into the core.

Braudel, Fernand. 1979. *Civilization and Capitalism 15th - 18th Century: The Structures of Everyday Life - The Limits of the Possible*. Paris: Librairie Armand Colin.

The very essence of what *long durée* approach to social science, this book provides a history of socio-economic life from the Middle Ages to the Industrial Revolution.

Wallerstein, Immanuel. 1974. "Dependence in an Interdependent World: Limited Possibilities of Transformation within the Capitalist World Economy." *African Studies Review* 17:1–26.

In this text Wallerstein lays out the groundwork for his concept of the semiperiphery and what it means for the world-system.

Wallerstein, Immanuel. 1974. "The Rise and Future Demise of the World Capitalist System: Concepts for Comparative Analysis." *Comparative Studies in Society and History* 16(4):387–415.

The necessity of trimodality, and unequal exchange for the existence and preservation of the modern world-system is outlined in this article.

Wallerstein, Immanuel. 1984. "Development of the Concept of Development." *Sociological Theory* 2:102–16.

In this article, Wallerstein argues that social science is fundamentally tied to the concept of development epistemologically and historiographically.

Elaborators I:

Many scholars have elaborated the concepts and added to a rich and still growing literature of the world-system perspective. Giovanni Arrighi and Jessica Drangel, argued that the semiperiphery could be empirically determined using gross national income per capita as a proxy for world-system position, and found the existence of a stable trimodal distribution of wealth. Arrighi has also argued that the modern system had emerged in 14th century alliance between Genoa, a capitalist city-state, and the Portuguese King Henry the Navigator. Influenced by Fernand Braudel's focus on cities and finance capital, Arrighi described the evolution of overlapping systemic cycles of accumulation based on changing relations between finance capital and state power. Terence Hopkins and Immanuel Wallerstein described the cyclical rhythms and secular trends of the capitalist world-economy as a stable systemic logic that expands and deepens from its start to its end, but maintains its basic nature over time. Arrighi saw overlapping systemic cycles of accumulation in which rising and falling hegemons expanded and deepened the commodification of the whole system. His modern world-system oscillated between more corporatist and more market-organized forms of political structure while the extent of commodification deepened in each round. Like Wallerstein, Arrighi focused on hegemony based on comparative advantages in profitable types of production. He built on Wallerstein's idea that each hegemon goes through stages in which the comparative advantage is first based on the production of consumer goods, and then capital goods and then finance capital. For both Wallerstein and Arrighi the hegemon is the top end of a global hierarchy that constitutes the modern core/periphery division of labor. Hegemonies are unstable and tend to devolve into hegemonic rivalry as comparative advantages diffuse and the hegemon fails to stay ahead in the development and implementation of new lead technologies. Except for terminology this is very similar to the power cycle theory of Modelski and Thompson (see section on world-systems and international relations below). Arrighi's formulation allowed for greater evolutionary changes as the modern system expanded and deepened while the Wallerstein/Hopkins formulation depicted a single continuous underlying logic and structure that did not change much except at the beginning and at the end of the historical system.

Chase-Dunn, C and Thomas D. Hall 1997 *Rise and Demise: Comparing World-Systems*
Boulder, CO.: Westview Press.

The comparative evolutionary world-system perspective, explaining the expansion of world-systems through interpolity interaction networks, is detailed in this book.

Chase-Dunn, Christopher. 1998. *Global Formation: Structures of the World-Economy*.
Lanham: Rowman and Littlefield.

In this text, Chase-Dunn explains his structural model of the world-system and how that produces global social institutions.

Hopkins, Terence K. and Immanuel Wallerstein. 1980. *Processes of the World-System*.
Beverly Hills: Sage.

This is an edited collection of essays from the third annual conference on the Political Economy of the World-System in May of 1979.

Wallerstein, Immanuel. 1984. "The three instances of hegemony in the history of the capitalist world-economy," in *The Politics of the World-Economy*, edited by Immanuel Wallerstein. Cambridge: Cambridge University Press.

In this essay, Wallerstein attempts to meticulously define and explain what is meant by hegemony from the world-systems perspective. He explains the processes that led to each instance of hegemony in the modern world-system.

Elaborators II:

Other scholars placed the emergence of the capitalist world-system at an earlier time or in a different part of the world altogether. Janet Abu-Lughod, argued for a 13th century multicore Eurasian world-system. Gunder Frank and Gills contended that capitalist imperialism existed since the emergence of cities and states in Mesopotamia in the Bronze Age. Frank later argued that the world-system was originally centered in China, which was more developed than Europe well into the 18th century. Samir Amin, agreed with Wallerstein regarding the importance of the rise of predominant capitalism in Europe

but he held that core-periphery relations and uneven development also existed in pre-capitalist world-systems. Walter Goldfrank analyzed the rise of 20th century fascism in world-systems and Polanyian terms as a reaction to systemic crises and he examined how fascist movements and statist authoritarian regimes differed in core, and non-core regions. Christopher Chase-Dunn developed a structural model of the modern world-system inspired by the world historical narratives of the world-system scholars and by Marx's theory of capitalist development. With Thomas D. Hall, he also developed a comparative evolutionary world-systems approach that conceptualizes world-systems as interpolity systemic interaction networks. The spatial scale of these systemic interaction networks expands with changes in transportation and communication technologies. Early world-systems were composed of small relatively egalitarian polities linked together in spatially small interaction networks. They did not have much in the way of core/periphery hierarchy, but core/periphery hierarchies emerged as world-systems got larger and core polities invented technologies of power that allowed them to extract resources from distant peoples. Chase-Dunn also proposed the idea that semiperipheral polities have often been the locus of implementation of new organizational and institutional features that have transformed world-systems. The work of other scholars shows that some semiperipheries are stabilizing and others are transformative. Beverly Silver demonstrated this for the case of Israel, Goldfrank for Chile, William Martin for South Africa, and Arrighi and Drangel for the whole system. Wilma Dunaway presented evidence of the Appalachian region's participation in the world-economy. It is an important instance of the nestedness of core/periphery relations and the existence of peripheralized regions within the core. Using qualitative network analysis combined with a world-system approach, Vilna Bashi Treitler demonstrated how transnational migration patterns cause global structural inequality. William Robinson's theory of global capitalism can be viewed as an extension of world-system theory that accounts for some of the distinctive features of recent decades.

Abu-lughod, Janet L. 1989. *Before European Hegemony: The World System A.D. 1250-1350*. New York: Oxford University Press.

Placing the beginnings of modern world system as early as the thirteenth century Abu-Lughod argues for a multicore Eurasian system.

Arrighi, Giovanni and Jessica Drangel. 1986. "Stratification of the World-Economy: An Exploration of the Semi-Peripheral Zone." *Review (Fernand Braudel Center)* X(1):9–74.

This article is an empirical study of world-system positionality from 1938 to 1983 and confirms the existence of a trimodal world-economic structure. It is also one of the most in-depth discussions of Wallerstein's concept of the semiperiphery.

Chase-Dunn, Christopher. 1988. "Comparing World-Systems: Toward a Theory of Semiperipheral Development." *Comparative Civilization Review* 19:29–66.

This article the role of the semiperiphery is conceptualized not only as a stabilizing force in the world-system but as an essential point for transformational change.

Dunaway, Wilma A. 1996a. *The First American Frontier: Transition to Capitalism in Southern Appalachia, 1700-1860*. Chapel Hill: The University of North Carolina Press.

This is an in-depth study of the Appalachian region in the world-system, which also highlights the nestedness of core-periphery relations and of peripheralized regions within the core.

Frank, Andre Gunder and Barry K. Gills. 1993. *The World System: Five Hundred Years or Five Thousand*. edited by A. Gunder Frank and B. K. Gills. New York: Routledge.

This book is an important examination of the idea of the world system and when and where it emerged. While the editors argue that capitalist imperialism appeared in Mesopotamia 5000 years ago others simply contend that core-periphery relationships and uneven development occurred in pre-industrial societies.

Goldfrank, Walter. 1978. "Fascism and World Economy." in *Social Change in the*

Capitalist World Economy. Beverly Hills: Sage Publications, Inc.

This chapter is a comparative analysis that explains how the rise of fascism is directly related to a country's level of capitalist development.

Martin, William G. 1990. *Semiperipheral States in the World-Economy*, edited by W. G. Martin. Westport, CT: Greenwood Press.

This is an essential book for understanding not only the role of the semiperiphery in the world-system but also semiperipheral development. A series of essays explain the stabilizing and sometimes transformational nature of the semiperiphery.

Robinson, William I. 2004. *A Theory of Global Capitalism: Production, Class, and State in a Transnational World*. Baltimore: The Johns Hopkins University Press.

This book is fundamental to understanding global capitalism as an extension of the modern world-system and the emergence of transnational capital.

Treitler, Vilna Bashi. 2018. "Migration as a Response to Global Inequality." in *Global Inequalities in World System Perspectives*, edited by M. Boatca, A. Komlosy, and H.-H. Nolte. New York: Routledge.

This book chapter is an example of how the global political economy shapes transnational migration patterns, which in turn can affect global structural inequality.

Critics

World-system analysis and its proponents have generated a wealth of scholarship, intellectual institutions and new ways of theorizing social change. Wallerstein's *The Modern World System* has presented the world history of social change as driven by capitalist economic accumulation. Wallerstein's version epitomizes an interdisciplinary and transdisciplinary approach to scholarship, and many world-system scholars have followed suit. The issue of when the modern world-system first emerged is linked with different definitions and conceptions of capitalism, but the idea of cyclical waves of capitalist development implies that the modern system may have emerged at several

different points, which depowers the importance of settling on a definitive answer as highlighted in the above section. Aristide Zolberg saw *The Modern World-System*, and by extension, world-system analysis in general, as logically circular economic reductionism. Theda Skocpol critiqued Wallerstein for his lack of insight on how and why capitalism emerged in Europe. For Skocpol, Wallerstein's arguments were teleological – the *feudal* system in Europe was in crisis and therefore, the system readjusted and came out of the crisis because of the emergence of the *capitalist* world-system. Robert Brenner, who called Wallerstein's work “neo-Smithian,” argued that Wallerstein's discussion of core-periphery relationship ignored the class struggles internal to the nation state in favor of external factors. Missing from Wallerstein's analysis of the transformation from feudal to capitalist world-economy was the transformation of production relations that spurred competition and therefore the need to maximize profits – key to capitalist economy. Core-periphery relations, Brenner held, were nothing like Marxist production relations. Yet, world-system analysis was also charged with prioritizing class struggles and a “master narrative” over issues of race and gender and with neglecting the environment. World-system analysis, especially *The Modern World-System* has also been critiqued as Eurocentric. Leslie Sklair argued that world-system analysis tends to be state-centric, ignoring transnational processes. Furthermore, it overlooks culture and insufficiently recognizes the distinct features of the global stage of capitalism. Wallerstein responded to his critics in the Prologue of the 2011 edition of *The Modern World System*. Arrighi and Jason Moore have also provided responses to some of these critiques.

Anievas, Alexander and Kerem Niancolu. 2015. *How The West Came To Rule*. London: Pluto Press.

While the authors acknowledge the intellectual strengths of the world-systems perspective, they assert that much of this approach, particularly as espoused by Wallerstein, is eurocentric at its core.

Arrighi, Giovanni. 1998. “Capitalism and the Modern World-System: Rethinking the Nondebates of the 1970s.” *Review (Fernand Braudel Center)* 21(1):113–29.

In this article, Arrighi confronts and responds to the major critiques of the world-systems perspective.

Aronowitz, Stanley. 1981. "Metatheoretical Critique of Immanuel Wallerstein's 'The Modern World-System'." *Theory and Society* 10(4):503–20.

In this article, Wallerstein's is charged with insufficiently addressing issues of race, gender and the environment while over focusing on class struggles in *The Modern World-System*.

Brenner, Robert. 1977. "The Origins of Capitalist Development: A Critique of Neo-Smithian Marxism." *New Left Review* 104:25–92.

One of the most cited critiques of The Modern World-System, in which Brenner argues that Wallerstein ignored the class struggles internal to the nation state in favor of external factors.

Chew, Sing. 1997. "For Nature: Deep Greening World-Systems Analysis for the 21st Century." *Journal of World-Systems Research* 3(3):381–402.

In this article, Chew discusses the limits of the world-systems perspectives with regards to ecological and environmentally focused analysis.

Frank, Andre Gunder 1998. *ReORIENT: Global Economy In the Asian Age*. Berkeley: University of California Press.

In this book Gunder Frank presents his argument that the capitalist world-economy was initially centered in China, contrary to Wallerstein's that the modern world-system emerged in Europe and predicted that the world-system would once again center around China.

Moore, Jason W. 2003. "'The Modern World-System' as Environmental History? Ecology and the Rise of Capitalism." *Theory and Society* 32(3):307–77.

This article meticulously combs through The Modern World-System to demonstrate Wallerstein's incorporation of the environment in his inquiry of the emergence of the

modern capitalist world-system.

Sklair, Leslie. 2012. "Challenges of Globalization Theory to World-Systems Analysis" in *Routledge Handbook of World-Systems Analysis: Theory and Research*, edited by Salvatore Babones and Christopher Chase-Dunn. London: Routledge.

This article discusses the transnational processes that undergird contemporary global capitalism.

Skocpol, Theda. 1977. "Wallerstein's World Capitalist System: A Theoretical and Historical Critique." *American Journal of Sociology* 82(5):1075–90.

Another highly cited article which is critical of The Modern System, particularly Wallerstein's discussion on why and when the capitalist world-system emerged questioning how the crisis facing the *feudal* system in Europe was resolved by the system readjusting itself because of the emergence of the *capitalist* world-system.

Zolberg, Aristide R. 1981. "Origins of the Modern World System: A Missing Link." *World Politics* 33(2):253–81.

In this article, the very logic the emergence of the world-system is questioned and Zolberg argues that The Modern World-System suffered from circular economic reductionist argumentation.

Global Commodity and Value Chains

In 1986 Terence Hopkins and Immanuel Wallerstein published an article entitled "Commodity chains in the world-economy prior to 1800" in *Review*, the journal of the Fernand Braudel Center at SUNY, Binghamton. They asserted that the capitalist world economy is composed of commodity chains -- forward and backward linkages of processes of production and consumption. These treelike sequences of production processes, exchanges, and final consumption acts, link raw materials, labor, the sustenance of labor, intermediate processing, final processing, transportation and final consumption into materially connected networks. The great bulk of consumption in the

capitalist world-economy is of products whose commodity chains cross national boundaries, much of which, link the core and the non-core. Hopkins and Wallerstein contended that core activities occurred at those nodes on commodity chains where capital-intensive technology and skilled highly paid labor were used, and where relatively greater amounts of surplus value were appropriated. The analysis and empirical study of commodity and value chains was taken up by Gary Gereffi, and a whole cottage industry emerged examining the transnational linkages and locations of profit-making. Fascinating world historical studies of single commodity chains were carried out. Gereffi developed the idea that buyer-driven commodity chains are one of the key organizational features of global capitalism. Commodity chain and value chain analysis has been used to counsel cities and countries about how to move up the global food chain to obtain greater shares of the profits. This literature became increasingly distant from the original focus of Hopkins and Wallerstein to understand how global inequalities are reproduced, though some scholars advocated a return to its global justice roots.

Bair, Jennifer. 2009. "Commodity Chains: Genealogy and Review" in *Frontiers of Commodity Chains Research*, edited by Jennifer Bair. Palo Alto: Stanford University Press.

This book chapter is an overview of the literature on commodity chains from a world-system, global commodity, and global value chains perspective.

Collins, Jane Lou. 2003. *Threads: Gender, Labor, and Power in the Global Apparel Industry*. Chicago: University of Chicago Press.

This is a fascinating study of the transnational processes at work that drive the international apparel industry and limits labor mobilization.

Derudder, Ben and Frank Witlox. 2010. *Commodity Chains and World Cities*. Malden: Wiley-Blackwell.

This is a look at the coffee commodity chain from a transnational and critical geography – world cities perspective.

Gereffi, Gary. 2018. *Global Value Chains and Development: Redefining the Contours of 21st Century Capitalism*. Cambridge, UK: Cambridge University Press.

This book contains the seminal texts for the global value chains (which is different from global commodity chains) approach to understanding contemporary global capitalism.

Gereffi, Gary. 1994. "The Organization of Buyer-Driven Global Commodity Chains: How US Retailers Shape Overseas Production Networks" in *Commodity Chains and Global Capitalism*, edited by Gary Gereffi and Miguel Korzeniewicz. Westport: Greenwood Press.

Gereffi argues that buyer-driven commodity chains (large retailers, marketers and branded manufacturers) as opposed to producer-driven commodity chains (large transnational manufacturers) is the key organizing feature of contemporary global capital.

Hopkins, Terence K and Immanuel Wallerstein. 1986. "Commodity Chains in The World-Economy Prior To 1800." *Review* 10(1): 157-70.

One of the first papers that launched the global commodity chains approach and its key concepts in world-systems analysis. It raises the issue of surplus value and its appropriation within the commodity chain.

Talbot, John M. 2004. *Grounds for agreement: the political economy of the coffee commodity chain*. Lanham: Rowman & Littlefield.

This is an in-depth study of the world coffee industry from a global commodity chain and world-system perspective.

International Relations Theory and the World-System Perspective

There has been considerable overlap with some international relations schools, especially the long cycle theory developed by George Modelski and William R. Thompson. Despite different conceptual terminologies, these approaches have had much in common. They

both see economics and politics as intertwined logics and analyze the rise and fall of hegemonic core powers, though Modelski and Thompson call them “system leaders.” Both Thompson and Modelski turned to questions of long-term sociocultural evolution. The world-system scholars are less functionalist and more critical of global capitalism and the great powers. One important difference is about the attention paid to the non-core. Like most international relations theorists, Modelski and Thompson focused most of their attention on the “great powers” in the interstate system – what world-system scholars call the core. The world-systems scholars see the whole system, including the periphery and semiperiphery, as an interdependent and hierarchical whole in which inequalities are reproduced by the normal operations of the system.

Chase-Dunn, Christopher and Hiroko Inoue. 2018. “Long Cycles and World-Systems: Theoretical Research Programs” in *Oxford Encyclopedia of Empirical International Relations Theories, Volume 2*, edited by William R. Thompson. New York: Oxford University Press and the Online Oxford Research Encyclopedia in Politics.

This article provides an evolutionary world-systems perspective on international relations.

Modelski, George. 1987. *Long Cycles in World Politics*. Seattle: University of Washington Press.

This book discusses the rise and decline of world powers since the sixteenth century.

Modelski, George and William R. Thompson. 1996. *Leading Sectors and World Powers: The Coevolution of Global Economics and Politics*. Columbia: University of South Carolina Press.

This book examines the coordinated cyclical movements of world economic and political powers.

Reuveny, Rafael and William. R. Thompson. 2008. *North and South in the Global Political Economy*. Cambridge, MA: Blackwell.

The evolution of the Global North-Global South divide is explored in this compilation of essays from the International Studies Association's 2006 Annual Meeting.

Thompson, William R. 2001. *Evolutionary Interpretations of World Politics*. London: Routledge.

This book examines global social and political change from an evolutionary perspective.

Thompson, William R. and George Modelski. 1998. "Pulsations in the World System: Hinterland to Center Incursions and Migrations, 4000 B.C. to 1500 A.D." in *Leadership, Production and Exchange: World Systems Theory in Practice*, edited by Nicholas Kardulias. Boulder: Rowman and Littlefield.

This chapter highlights the role of the migration of people from the non-core into the core in global transformations.

Women and Gender

Feminists argued that the original world-system perspective ignored gender hierarchy and some sought to remedy that defect. Maria Mies explored the links between core/periphery hierarchy, gender relations and the ways in which capitalist accumulation relied on the unwaged labor of women households. Claudia von Wehrlof contended that the most fundamental dimension of oppression and exploitation in the capitalist world-economy (both core and periphery) is that which exploits the unpaid labor of women and peasant "semi-proletarians." The definitional blindness which fails to calculate the labor contribution expended within households and within the peripheral non-monetized sectors to the reproduction of the world work force was seen as fundamental to the nature of the modern system, rather than as a vestigial backwater of a former mode of production. Wallerstein argued that the systematic reproduction of non-wage forms of labor is the main mechanism which prevents the equalization of core capitalist accumulation. Kathryn Ward working from the "women and development" perspective, contended that it is the combination of Western health technology and the kind of dependent economic development occurring in the periphery that stunted the

demographic transition and worsened the economic status of women. Joan Smith *et al.* provided an in-depth look at how racism and sexism are part and parcel of the capitalist world-economy disguising unpaid labor in the working-class household. The low pay and non-remuneration generated by sexism and racism have subsidized the capitalist economy and maintained inequality. Valentine Moghadam theorized that capitalist accumulation in the world-economy included both waged and non-waged labor (particularly that of women) and both formal and informal labor, adding a gender dynamic in the spheres of production and reproduction of global accumulation. Wilma Dunaway reminded scholars that global commodity chains include the reproductive labor and unpaid household labor of women.

Dunaway, Wilma A. 2014. "Introduction." in *Gendered Commodity Chains: Seeing women's work and households in global production*, edited by W. A. Dunaway. Stanford: Stanford University Press.

In this book chapter, Dunaway argues for the inclusion of gendered work in global commodity chains in particular, women's reproductive labor.

Mies, Maria. 1986. *Patriarchy and Accumulation on a World Scale*. London: Zed Books
This book theorizes the role of women in the international division of labor

Moghadam, Valentine M. 1999. "Gender and Globalization: Female Labor and Women's Mobilization." *Journal of World-Systems Research* 5(2):367–88.

In this article, Moghadam adds a gender dynamic by including waged and non-waged labor of women in theorizing the spheres of production and reproduction of global accumulation.

Smith, Joan, Jane Collins, Terrence K. Hopkins, and Akbar Muhammad, eds. 1988. *Racism, Sexism and the World-System*. New York: Greenwood Press.

An important text which conceptualises racism and sexism as part and parcel of the capitalist world-economy.

von Werlhof, Claudia. 1984. "The proletariat is dead; long live the housewife?" in *Households and the World-Economy*, edited by Joan Smith, Immanuel Wallerstein and Hans-Dieter Evers. Beverly Hills: Sage
A discussion of housework as a contribution to the world-economy.

Wallerstein, Immanuel. 1983. *Historical Capitalism*. London: Verso.

In this text, Wallerstein argues that structural inequality can be maintained through systematic reproduction of non-wage forms of labor.

Ward, Kathryn B. 1984. *Women in the World-System: Its Impact on Status and Fertility*. New York: Praeger.

In this book, Ward argues that the economic conditions which cause underdevelopment in peripheral and semiperipheral states are the same ones that reproduce the inferior economic status of women as well as continued levels of fertility and growing economic inequality.

Ward, Kathryn B. 1993. "Reconceptualizing World-System Theory to Include Women." in *Theory on Gender/Feminism on Theory*, edited by P. England. New York: Aldine Publishing.

In this book chapter, Ward contends that comparisons can be drawn between core-semiperiphery-periphery relations and the economic status and conditions of women.

Racism, Ethnogenesis, and Slavery

There is a limited but important scholarship on racism, ethnogenesis and slavery from the world-systems perspective. Immanuel Wallerstein contended that racism is structurally connected with the core/periphery hierarchy of the modern world-system. Based on his work on incorporation of peoples who had been on the outer edge of large world-systems, Thomas Hall argued that the process through which ethnic groups (ancient and contemporary) have been created, transformed (ethnogenesis) and destroyed cannot be

understood without understanding world-system processes. Wilma Dunaway has written extensively on the incorporation of Appalachia and the Cherokee into the modern world-system, while Sandra Faiman-Silva brought the Choctaw into the incorporation literature. Dale Tomich studied the impact of the transforming world-economy on the plantation system and more specifically on slave-dependent agricultural economies. He focused on the island of Martinique in the Caribbean using the concept of “circuit of sugar” to demonstrate the connectedness of the sugar market with production and trade in the world-economy. Later, Tomich expanded his work to focus on the role of slavery in the development of the capitalist world-economy at large. Marietta Morrissey examined the intersection between slavery and gender in the world-economy. In their discussion of modes of accumulation in world-systems, Chase-Dunn and Hall note that when slaves were treated as private property and traded on a price-setting market, slavery had become commodified labor. Wallerstein, on the other hand, claimed plantation slavery in the European periphery was a form of capitalist production. Arrighi distinguished between voluntary (immigration) and involuntary (labor of slaves) unilateral transfers of labor which, like unequal exchange, contributed to the formation and continued reproduction of the world-economic system and the core/periphery hierarchy.

Arrighi, Giovanni. 1990. “The Developmentalist Illusion: A Reconceptualization of the Semiperiphery.” Pp. 11–42 in *Semiperipheral States in the World-Economy*, edited by W. G. Martin. Westport, CT: Greenwood Press.

In this book chapter, Arrighi argues that involuntary unilateral transfers of labor such as the labor of slaves was just as significant as unequal exchange in the continued reproduction of the core-periphery hierarchy of the modern world-system.

Chase-Dunn, Christopher and Thomas D. Hall. 1992. “World-Systems and Modes of Production: Toward the Comparative Study of Transformations.” *Humboldt Journal of Social Relations* 18(1):81–117.

Chase-Dunn and Hall’s article note that the argument that slaves were private property and could be traded on a price-setting market meant that slavery was commodified

labor.

Dunaway, Wilma A. 1996b. "The Incorporation of Mountain Ecosystems into the Capitalist World-System." *Review (Fernand Braudel Center)* 19(4):355–81.

In this article Dunaway documents the incorporation of the Appalachian region into the capitalist world-economy.

Dunaway, Wilma A. 2014. "Introduction." in *Gendered Commodity Chains: Seeing women's work and households in global production*, edited by W. A. Dunaway. Stanford: Stanford University Press.

In this book chapter, Dunaway argues for the inclusion of gendered work in global commodity chains in particular, women's reproductive labor.

Faiman-Silva, Sandra L. 1997. *Choctaws at the Crossroads: The Political Economy of Class and Culture in the Oklahoma Timber Region*. Lincoln: University of Nebraska Press.

Using the world-systems approach, this book examines the political economy of the Choctaws at the end of the twentieth century.

Hall, Thomas D. 1998. "The Effects of Incorporation into World-Systems on Ethnic Processes: Lessons from the Ancient World for the Contemporary World." *International Political Science Review/Revue Internationale de Science Politique* 19(3):251–67.

Thomas Hall argued that the process through which ethnic are created, transformed and destroyed cannot be understood without understanding world-system processes.

Morrissey, Marietta. 1989. *Slave Women in the New World: Gender Stratification in the Caribben*. Lawrence: University Press of Kansas.

Morrissey's text is an excellent study of the intersection between slavery and gender in the world-economy.

Tomich, Dale W. 1990. *Slavery in the Circuitry of Sugar: Martinique and the World Economy, 1830-1848*. Baltimore: Johns Hopkins University Press.

In this book Tomich examines the impact of a changing world-economy on slave-dependent agricultural economies.

Tomich, Dale W. 2004. *Through the Prism of Slavery: Labor, Capital and World Economy*. Lanham: Rowman & Littlefield.

This text presents a thorough study of the role of slavery in the development of the capitalist world-economy.

Wallerstein, Immanuel. 1987 "The construction of peoplehood: racism, nationalism, ethnicity" *Sociological Forum* II, 2:373-388.

Hegemonic Rise and Fall and Global Social Movements

All world-systems are multicentric interpolity systems, but they vary in terms the degree of concentration of political, military and economic power exists among the contending core polities. So-called world empires had very large powerful states or empires in the core, but there have not been any empirical world-systems in which a single polity dominates the whole system. All systems oscillate about the degree of concentration of power. Paramount chiefdoms, hegemonic core states and gigantic empires all rise and fall. The world-system perspective depicts three modern periods of hegemony, the Dutch in the 17th century, the British in the 19th century and the United States in the 20th century. The Dutch hegemony was more a case of the leading edge in the development of capitalist institutions (stock markets and transnational corporations) than a preponderance of military power. Giovanni Arrighi proposed that systemic cycles of accumulation were tied to transitions of hegemony, and his later book on China devotes considerable attention to the decline of U.S. hegemony. Using the World Labor Research Working Group Database on Labor Unrest, Beverly Silver has shown that there has been a strong link between labor-capital conflict as indicated by strike activity and cycles of

hegemony. Chase-Dunn and Bruce Podobnik as well as Robert Denemark have identified the ways in which changes in the power of states have led to large scale warfare. Arrighi and Silver discussed the hegemonic decline of the United States and the possibilities for a non-catastrophic transition from U.S. hegemony. Jackie Smith linked social movements and global resistance protests to capitalist labor-capital conflicts. Smith and Dawn Weist noted that deepening global crises have been generated by the negative effects of the neoliberal globalization project. Albert Bergesen and Christian Suter analyzed waves of globalization and de-globalization as well as interimperial rivalry and economic nationalism.

Arrighi, Giovanni. 1994. *The Long Twentieth Century: Money, Power and the Origins of Our Times*. New York: Verso.

In this book, the modern world-system is shown to emerge during the 14th century, embodied in the relations between Genoan city states and Portugal and systemic cycles of accumulation are tied to transitions of hegemony.

Arrighi, Giovanni. 2007. *Adam Smith in Beijing: Lineages of the Twenty-First Century*. New York: Verso.

This text deals with the rise of contemporary China and the decline of U.S. hegemony.

Arrighi, Giovanni and Beverly J. Silver. 1999. *Chaos and Governance in the Modern World System*. Minneapolis: University of Minneapolis Press.

This book provides an in-depth examination of the U.S. hegemonic decline and the possibilities for a non-catastrophic transition either to a multipolar world or to give rise to a new hegemon.

Bergeson, Albert J., and Christian Suter. 2018. *The Return of Geopolitics*. Zurich: LiT Verlag.

This is a collection of essays on interimperial rivalry and economic nationalism.

Chase-Dunn, Christopher and Bruce Podobnik. 1995. "The Next World War: World-System Cycles and Trends." *Journal of World-Systems Research* 1(6):317–48.

This text deals with the role of large scale warfare on changes in the power of states in the world-system.

Chase-Dunn, Christopher, Roy Kwon, Kirk Lawrence, and Hiroko Inoue. 2011. "Last Of The Hegemons: US Decline and Global Governance." *International Review of Modern Sociology* 37(1): 1-29.

An examination of economic and military power since 1820 using macro-economic indicators.

Denemark, Robert. 2018. "Nuclear War in the Rivalry Phase of the Modern World-System." *Journal of World-Systems Research* 24(2): 348-371.

An in-depth historical analysis of the rivalry phase of the modern world-system, wherein the use of nuclear weapons in large scale warfare is becoming more and more possible.

Silver, Beverly J. 2003. *Forces of Labor: Workers' Movements and Globalization Since 1870*. New York: Cambridge University Press.

This is a thorough text on the link between cycles of hegemony and labor-capital conflict.

Smith, Jackie. 2001. "Globalizing Reistance: The Battle of Seattle and the Future of Social Movements." *Mobilization: An International Quarterly* 6(1):1–19.

In this article, the link between social movements and global resistance protests to capitalist labor-capital conflicts is very clearly drawn.

Smith, Jackie and Dawn Wiest. 2012. *Social Movements in the World-System: The Politics of Crisis and Transformation*. New York: Russell Sage Foundation.

This book documents the deepening global crises generated by the negative effects of the neoliberal globalization project.

Ecology, Environment and Climate Change

Early iterations of the world-systems perspective was critiqued for neglecting ecology and the environment in its analysis of global change. However, many scholars have emerged to bring climate into the discourse. J. Timmons Roberts and Peter Grimes note that world-systems' holistic, materialist, structuralist and long history approach to analysis is an excellent tool for understanding the environment and cycles of crisis and non-core exploitation. Wallerstein addressed the question of the environment in the capitalist world-economy in his keynote at the 11th Political Economy of the World-Systems Spring Conference. He pointed to the contradictory relationship between the push for endless accumulation of capital, and the exploitation and subjection of nature to that end. This relationship is based on the idea that nature is meant to be conquered by man and the fact that capitalists do not pay the price of the negative effects of the exploitation of nature. For Wallerstein, capitalism will reach an asymptotic crisis point in part because corporations will increasingly be required to pay off the environmental costs that their activities incur. Bunker and Ciccantelli argue that the distinctive feature of the modern capitalist world-economy is its systematic expansion of the exploitation of nature via the global division of labor. Each rising hegemon expands the exploitation of nature in order to expand capital accumulation. It is not the expansion of capital accumulation that expands the exploitation of nature. For Jason Moore, capitalism emerges through the relations humans have with nature (world-ecological process). He develops the concept of world-ecology wherein capitalism is both appropriative and exploitative, pushing capitalist transformation of nature beyond the commodification of nature. Alf Hornborg notes that the discourse on development must incorporate the role of the world-system structure. He examines the ways technology and technological fixes to economic crises, can in fact generate uneven development. Andrew Jorgenson utilizes the historically grounded world-systems core-periphery model to demonstrate the link between environmental degradation as both the cause and consequence of underdevelopment in the semiperiphery and periphery. *Globalization and the Environment* includes a number of essays, that examine how the world-economy and other non-economic systems,

structure and impact the environment and lives of people across the globe, from Ancient Egypt to the Modern Amazon. John Foran and Richard Widick take a climate justice approach arguing political cultures of resistance, such as global climate justice movements are necessary for dealing with the ecological crises of the modern world-system.

Bunker, Stephen G. and Paul S. Ciccantell. 1999. "Economic Ascent and the Global Environment: World-Systems Theory and the New Historical Materialism." in *Ecology and The World-System*, edited by W. Goldfrank, D. Goodman, and A. Szasz. Westport, CT: Greenwood Press.

In this book chapter, the systematic expansion of the exploitation of nature via the global division of labor is presented as the distinctive feature of the modern world-system.

Foran, John and Richard Widick. 2011. *Earth Crisis?: A Forward-Looking Agenda for Research on the Cultural Causes and Consequences of Climate Change 2010-2020 and Beyond*. Washington, DC.

This text provides a basic assessment of the ecological crises generated by the modern world-system, and demonstrates the need for global climate justic movements.

Peter Grimes. 1999. "The Horsemen and the Killing Fields: The Final Contradiction of Capitalism" in *Ecology and The World-System*, edited by W. L. Goldfrank, D. Goodman, and A. Szasz. Westport, CT: Greenwood Press.

In this book chapter, the link between environmental degradation and capital accumulation is teased out from an ecololical and world-system perspective.

Hornborg, Alf. 2001. *The Power of the Machine: Global Inequalities of Economy, Technology and Environment*. Lanham: Rowman & Littlefield.

This book examines the role of technology and technological fixes to global economic crises can in fact generaate unequal development.

Hornborg, Alf. 2009. "Zero-Sum World: Challenges in Conceptualizing Environmental Load Displacement and Ecologically Unequal Exchange in the World-System." *International Journal of Comparative Sociology* 50:237–62.

In this journal article, Hornborg makes the case for world-systems analysis to explicate the limits of development.

Jorgenson, Andrew K. 2003. "Consumption and Environmental Degradation: A Cross-National Analysis of the Ecological Footprint." *Social Problems* 50(3).

An essential text in understanding the link between environmental degradation as both the cause and consequence of underdevelopment in the semiperiphery and periphery.

Jorgenson, Andrew K. and Edward L. Kick. 2003. "Globalization and the Environment." *Journal of World-Systems Research* IX(2):194–2003.

This is a special issue of the *Journal of World-Systems Research* which describes how the world-economy and other non-economic systems, structure and impact the environment and lives of people across the globe, from Ancient Egypt to the Modern Amazon.

Moore, Jason W. 2015. *Capitalism in the Web of Life: Ecology and the the Accumulation of Capital*. New York: Verso.

An important text on the world-ecological process, which is the emergence of capitalism through the relations humans have with nature.

Moore, Jason W. 2016. *Anthropocene or Capitalocene? Nature, History, and the Crisis of Capitalism*. edited by J. W. Moore. Oakland, CA: PM Press.

One of the defining text on world-ecology wherein capitalism is established as both appropriative and exploitative, pushing capitalist transformation of nature beyond the commodification of nature

Roberts, J. Timmons and Peter Grimes. 1999. "Extending the World-System to the Whole System: Towards a Political Economy of the Biosphere." in *Ecology and The World-System*, edited by W. L. Goldfrank, D. Goodman, and A. Szasz. Westport, CT: Greenwood Press.

The case is made for the world-systems' holistic, materialist, structuralist and long history approach to analysis to understanding the environment and cycles of crisis and relations of exploitation.

Wallerstein, Immanuel. 1999. "Ecology and Capitalist Costs of Production: No Exit." in *Ecology and The World-System*, edited by W. Goldfrank, D. Goodman, and A. Szasz. Westport, CT: Greenwood Press.

This is a keynote address given at an early Political Economy of the World-Systems Spring Conference, in which Wallerstein details the relationship between the exploitation of nature and capitalism.

Regional Applications: Africa, Latin America, Asia

Africa: Wallerstein has claimed that his scholarship has been inspired by the African nationalist movements, observing that they clearly understood their systemic colonial situation. He points to the significant role of colonialism in the development of underdevelopment (to use Gunder Frank's words). He also notes that the emergence of the capitalist mode of production in Europe and the building of a hierarchical world-division of labor, led to the preemptive incorporation of Africa into the periphery of the Europe-centered system. Arrighi highlighted the systemic processes that precipitated the collapse of African economies in the 1980s and kept much of the African continent at the bottom of the world hierarchy of wealth. Following Arrighi's methodological cues, Marilyn Grell-Brisk showed that, while the African region continues to stagnate in terms of the global economic hierarchy, some individual countries have benefited from their interactions with the Peoples' Republic of China, which have, in part, allowed them to steadily move up the hierarchy or maintain semiperipheral status. **Latin America:** Andre Gunder Frank was the original Latin Americanist who developed his version of the world-

system perspective. His work emphasized how Latin American societies had been linked with and exploited by the European core since the 16th century. Korzeniewicz and Smith and the other contributors to *Latin America in the World System* suggest that the region, during the 1990s, was experiencing a great transformation. William Robinson, a theorist of global capitalism, is a Central Americanist who has studied how the economic and political trajectories of Latin American societies have been shaped by globalizing capitalism. *Asia*: Ho-fung Hung analyzed the rise of China in the contemporary world-system and how it may transform the structure and dynamics of global capitalism. Hung has also examined the possibility of a Chinese-centered global economy but thinks that China will not become a new hegemonic core power unlike Arrighi who made the case for a rising China in the context of a waning U.S. hegemony. Silver and Zhang argued that China could become an important new locus of global labor/ capital conflict. Takeshi Hamashita examined the changing relationship between East Asia and the Europe-centered world-economy since the 16th century. Alvin So and Stephen Chiu examined the origins and transformation of East Asia from a world-systems perspective, while Frederic Deyo looked at the how the newly industrializing countries of Taiwan, Hong Kong, Singapore and South Korea, had been shaped by the global economic order.

Arrighi, Giovanni. 2002. "The African Crisis: World Systemic and Regional Aspects."
New Left Review 15(May/June):5–36.

In this article, Arrighi documents the systemic reasons for the collapse of the world economy which relegated much of Africa to the bottom of the world hierarchy of wealth.

Grell-Brisk, Marilyn. 1919. "Arrested Development? Sub-Saharan Africa in the Stratified World-Economy 1965 to 2015." *Journal of Contemporary African Studies*.

Grell-Brisk, using the methods of Arrighi and Drangel, empirically demonstrates the world-system position of much of Sub-Saharan Africa in the contemporary world economy.

Hamashita, Takeshi. 2008. *China, East Asia and the Global Economy*. edited by L. Grove and M. Selden. New York: Routledge.

This is a historically grounded text on the changing relationship between East Asia and the Europe-centered capitalist world-economy.

Hung, Ho-fung 2009 "The Three Transformations of Global Capitalism." in *China and the Transformation of Global Capitalism*, edited by H. Hung. Baltimore: The Johns Hopkins University Press.

In this book chapter, Hung lays the groundwork for explaining how the rise of China was shaping and transforming the structure and dynamics of global capitalism.

Hung, Ho-fung. 2016. *The China Boom: Why China Will Not Rule The World*. New York: Columbia University Press.

This is a fundamental text in understanding the political economy of the rise of China and why this does not translate into hegemony for China.

Korzeniewicz, Roberto Patricio and William C. Smith. 1996. "A Great Transformation?" in *Latin America in the World-Economy*, edited by R. P. Korzeniewicz and W. C. Smith. Westport, CT: Greenwood and Praeger.

This text details the expansion of capital accumulation, and possible transformation of Latin America.

Robinson, William I. 2008. *Latin America and Global Capitalism: A Critical Globalization Perspective*. Baltimore: The Johns Hopkins University Press.

In this book, Robinson examines how globalizing capitalism have shaped the economic and political trajectories of Latin American societies.

Silver, Beverly J. and Lu Zhang. 2009. "China as an Emerging Epicenter of World Labor Unrest." in *China and the Transformation of Global Capitalism*, edited by H. Hung. Baltimore: The Johns Hopkins University Press.

In this essay, Silver and Zhang make the case for China as a new center of global labor-capital conflict.

Wallerstein, Immanuel. 1961. *Africa: The Politics of Independence and Unity*. New York: Vintage Books.

In this text, Wallerstein emphasizes the role of colonialism in the development of underdevelopment in Africa.

Wallerstein, Immanuel. 1973. "Africa in a Capitalist World." *Issue: A Journal of Opinion* 3(3):1–11.

In this article, Wallerstein argues that the emergence of the capitalist mode of production in Europe with its hierarchical division of labor led to the preemptive incorporation of Africa into the peripheral zone of the world-economy.