Immanuel Wallerstein’s Lasting Legacies

Valentine M. Moghadam
Northeastern University, Boston
v.moghadam@northeastern.edu

Valentine M. Moghadam is Professor of Sociology and International Affairs at Northeastern University, Boston, which she joined in January 2012. Previously she directed women’s studies programs at Purdue University and Illinois State University, and she was a section chief at UNESCO and a senior researcher at UNU/WIDER. Born in Iran and the author of many publications, her areas of research include globalization, transnational social movements and feminist networks, and gender, politics, and development in the Middle East and North Africa.

It is remarkable how Immanuel Wallerstein’s work resonates with certain students, whether undergraduate or graduate. In courses I teach, such as Senior Capstone in International Affairs and a graduate-level course on globalization, the concepts and framework that Wallerstein developed decades ago have an almost uncanny explanatory power for the economic and political trends that are examined. As an interdisciplinary macro-sociological analytical framework that also accounts for meso- and micro-level entities and processes, the world-systems perspective appeals to some of my more discerning students—including those exposed to neoclassical economics and to realism in political science—who go on to apply world-systems analysis to their final papers. In
this essay, I expound on Wallerstein’s appeal to students, my own engagement with world-systems analysis and its relevance to feminist analyses, and Wallerstein’s scholarly and political legacies.

International Affairs is by definition an inter-/multi-disciplinary academic program, and most of our students have combined majors—in history, political science, sociology, economics, business—as well as concentrations (e.g., Middle East Studies). The interdisciplinary grounding, I think, may be why some of my students are prepared for Wallerstein’s writings. In one course, students begin by reading the Communist Manifesto, followed by Rostow’s “non-communist manifesto” on stages of economic growth. They then move on to several articles on dependency/dependent development (notably Andre Gunder Frank and Henrique Cardoso), after which they read Wallerstein’s introductory text on world-systems analysis (Wallerstein 2004). By this time, they are able to appreciate how both the dependency theorists and Wallerstein’s historical-sociological analysis seriously challenged modernization theory, and how the class-stratified system discussed by Marx and Engels is replicated at the global, interstate level.

I then introduce them to the world society perspective, in part because of its place in the discipline of sociology and connection to constructivist political science. As a more sophisticated and Weberian version of the early modernization theory, the world-society perspective views institutions and their role in the wider social system differently from the Marxian-inspired world-systems approach.

As Wallerstein emphasized, the capitalist world-economy is a collection of many interrelated institutions, including markets, firms, the multiple states within the international system, households, social classes, and status or identity groups. The axial division of labor within the world-economy divides production into core and periphery, across which there are various kinds of flows—of commodities, capital, and labor—which underlie unequal exchange dynamics. This structure is replicated in the international system, wherein sovereignty depends on both the state’s capacity to effectively exercise authority internally and “the degree to which they can hold their heads high in the competitive environment of the world-system” (Wallerstein 2004: 56). It also depends on relations with the hegemon. By reading Wallerstein, students understand that states within and across the economic zones are differentially affected by processes such as globalization, commodity price speculation and market volatility, debt, revolutions, democratic transitions, sanctions, wars, and pandemics.

For Chase-Dunn (1998), the resultant global hierarchy is reproduced by differential incorporation into commodity chains and operates at national and sub-national scales. Given the hierarchies of what Chase-Dunn—drawing on Althusser’s (1971) concept of the capitalist social formation (with its structures and institutions reflecting and reinforcing class inequalities)—has called the “global formation,” it is not surprising that inter-governmental organizations are systemically embedded in and help to reproduce the cultural scripts and other rules of the capitalist world-system and indeed rationalize it.¹ The World Bank and the International Monetary Fund exemplify this postulate (Wallerstein 2004: 87).

¹ See also Downey et al. (2020) for an incisive critique of world society theory.
In their various courses, International Affairs students learn to appreciate the salience of norms, treaties, laws, multilateral agencies, and non-governmental organizations, but their exposure to world-systems analysis helps make them aware of the structural forces behind institutional limitations, inconsistencies, or biases. My students may not have read Wallerstein’s (1974) *The Modern World-System* to grasp the complex historical patterns that culminated in today’s world order, but they do learn that the three structural positions in the world-economy—core, periphery, and semi-periphery—had become set by around 1640. Students who have recently been introduced to “decolonial” or “postcolonial” theorizing come to appreciate Wallerstein’s discussions of post-colonial independence, transitions, and travails. (They also are introduced to Marx’s sardonic comments on “the rosy dawn of the era of capitalist production” in chapter 31 of the first volume of Capital—which surely inspired Wallerstein.) Indeed, concepts such as world-economy, economic zones, global commodity chains, cycles of accumulation, and (declining) hegemony are eye-openers that some of my students have applied to papers on development aid, foreign direct investment, and loans; female formal and informal labor in a peripheral or semi-peripheral economy; China in the world-system; the Russia-Ukraine-NATO war; and disparities in the COVID-19 vaccine distribution. Such papers are a pleasure to read.

In another course, students read *Does Capitalism Have a Future?* (Wallerstein et al. 2013), which helps them discern more deeply the contemporary world order’s dysfunction, and they can appreciate the book’s diverse but compatible sociological approaches to the challenging macro-political and macro-economic developments of our time. Wallerstein’s chapter on the crisis of capital accumulation and the end of equilibrium and hegemonic legitimacy (Wallerstein 2013) is a brilliant addendum to the 2004 introductory text, one that enables students to appreciate the geo-economic and the geo-political in Wallerstein’s work. In all cases, my hope is that the undergraduate students who are introduced to Wallerstein’s work will continue to engage with it in their graduate studies.

**Feminism and World-Systems Analysis**

Whereas Marx had distinguished between surplus value and use value, focusing primarily on the role of productive labor by industrial workers, feminists in the 1970s began to discuss women’s domestic work as productive labor, which they saw as especially critical to social reproduction.\(^2\) Further, they extended the Marx and Engels formulation of the exploitation of labor in capitalist society to women’s subordination within the family. Maureen Mackintosh (1977), for example, critiqued Claude Meillassoux—a key figure in the French school of economic anthropology—for his lack of attention to women’s subordination in pre-capitalist modes of production and in social reproduction under capitalism. A similar gap was later found to be evident in the work of Wallerstein and other world-systems analysts, especially those writing on global commodity chains (see Dunaway 2001), even if the theoretical architecture allowed for conceptualization of,

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and empirical research into, the diverse forms of female labor in the world-economy and contributions to capital accumulation.

For example, in an edited volume on “labor in the world social structure” (Wallerstein 1983) following a conference with Soviet scholars, none of the essays, including Wallerstein’s own introductory chapter on analytical propositions and political prospects, discussed female labor. Were women not part of the “world working class” and class-based mobilizations to which most of the chapters were devoted? By this time, Diane Elson and Ruth Pearson had published a paper on women’s employment in the growing export manufacturing sector of peripheral economies (Elson and Pearson 1981), and a decade earlier, Ester Boserup had produced Women’s Role in Economic Development (Boserup 1970). Across the globe, women’s economic activities in agriculture and manufacturing—both waged and unwaged, home-based or in “world factories”, proletarian and semi-proletarian—were highly visible and the subject of a growing literature (e.g., Nash and Fernandez-Kelly 1983; Mies 1986). Given the famously central and longstanding role of Soviet women in agriculture, manufacturing, and services, it is curious that they are not mentioned in the book.

The 1983 book’s silence on women workers/female labor is also curious given Wallerstein’s earlier work on commodity chains and households with Terence Hopkins. ³ The two scholars had noted that wage-labor is but “one form of proletarian status among a variety of forms co-existent within the capitalist world-economy, which are primarily located, not incidentally, in different zones of the world-economy” (Hopkins and Wallerstein 1977: 122). They identified commodity chains as “networks of labor and production processes,” which reflected “the reproduction of the labor forces involved in these productive activities” (Hopkins and Wallerstein 1977: 122). In an echo of Marxist-feminist scholarship on women’s domestic labor and on social reproduction, Hopkins and Wallerstein underscored the importance for commodity chains of the reproduction of labor forces and the provisioning of low-paid waged workers. Anticipating the later work on global commodity/value chains, they wrote: “If the ultimate consumable were, say, clothing, the chain would include the manufacture of the cloth, the yarn, etc., the cultivation of the cotton, as well as the reproduction of the labor forces involved in these productive activities” (Hopkins and Wallerstein 1977: 128). Elsewhere, in the discussion of data and measurement, Hopkins and Wallerstein noted the centrality of households as labor-producing institutions with “varying patterns of different members (male and female, young and old)” and differences according to economic zone (Hopkins and Wallerstein 1977: 140). These were important insights, although—as Dunaway (2014) cogently argued—the implicit gender dynamics were neglected by analysts of global commodity/value chains.

The lapse was soon corrected, starting with research on households and the world-economy. As noted, Wallerstein identified the diverse institutions that make up a world-economy. In addition to markets, firms, states, and social classes, households are key institutions. Given the emerging

³ Note that some scholars of Africa had earlier drawn attention to the gendered nature of labor and property rights (e.g., Goody and Buckley 1973).
studies on the “informal economy” (ILO 1972; Hart 1973) and the growing feminist literature on women in the world economy, and given also the recognition of the diverse forms of labor and economic activity contained within the capitalist world-economy—with the attendant differential wage levels across and within core, periphery, and semi-periphery—it was inevitable that world-systems scholars would direct attention to informal and domestic labor. This was, however, a revision of Marx’s definition of modern capitalism as commodity production based on wage labor and surplus extraction, and of the centrality of class.

With Joan Smith, Wallerstein in the 1980s examined more closely the role of households in the world-system, identifying them as “income-pooling units” that varied by structural location and by period of expansion and contraction. Two books ensued. With Hans-Dieter Evers, Wallerstein, and Smith (1984) produced a study of households in the world-economy. Wallerstein and Smith (1992a) then produced a second edited volume. Those studies elucidated at least two critical conceptual insights: Firstly, how the labor required to generate the commodities that fill global commodity chains takes non-waged forms that are closely tied to the sphere of reproduction; and secondly, whereas the diverse forms of labor within and across households reflected the complex structure of the world-economy, they also were a defense mechanism against the global stagnation of the time, or what world-systems analysts called the B-phase downturn of the Kondratieff wave (Wallerstein and Smith 1992b).

As I have mentioned, those studies were in alignment with the growing literature on the informal sector and on female labor in the export sector.4 But they were quite a departure from a prolific literature, much of it steeped in the methodological individualism of neoclassical economics, which examined households as key units for micro-level economic decision-making, or—as in Parsons’s sociology—defined the family in terms of traditional sex roles as well as its socialization function. The world-systems approach differed in viewing households as constructs of the world-economy and its economic zones, influenced by world-systemic processes such as economic cycles and waves of accumulation. The state and ethnicity also were salient; in their introductory chapter, Wallerstein and Smith (1992) note “the role of the state machinery in molding and remolding household structures” and of ethnicity “as a modality of socializing household members” (Wallerstein and Smith 1992: 20–21). Such insights draw on, and inform, the book’s case studies, which cover household labor, economic processes, and state policies in core, peripheral, and semiperipheral zones. Those insights have been extended to regions not included in the volume, such as the Middle East and North African countries that I study (see below).

The 1992 volume’s case studies—detailed analyses of the United States and Puerto Rico, Mexico, and southern Africa, with a focus on proletarian and semi-proletarian households and regions—did analyze intra-household gender dynamics, and Joan Smith’s “postscript on method”

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4 Another publication (Smith et al. 1988) provided detailed case studies documenting the presence of female labor in the world-economy and elucidating the operations of gender and race/ethnicity in lowering labor costs in Asia and the United States.
refers to the 1970s–1980s feminist studies on women’s domestic labor. Yet, more attention needed to be directed to the gendered nature of work, surplus extraction, and resource allocation, not to mention intrahousehold inequalities. In fact, households are gendered sites of production and reproduction. As Wilma Dunaway (2001) noted, women—as distinct from households—tended to be absent in world-systems analysis, pointing out that “women and girls contribute more labor power to household survival than males; but they receive an inequitable share of the total pool of resources” (Dunaway 2001: 12; echoing Mies, Bennhold-Thomsen, and von Werlhof 1988). Dunaway (2014) then continued to investigate women’s roles in commodity chains. Similarly, Jennifer Bair’s (2010) review of the scholarship on global commodity/supply/value chains acknowledged the absence of women, gender, and households. Wallerstein caught on, and by 2014, he could ask rhetorically: “How is it possible not to notice that commodity chains are gendered?... There is an incredible amount of foot-dragging and resistance to introducing gender into commodity chain analysis,” even though “gender is itself a principal constitutive feature of the commodity chains” (Wallerstein 2014: xii).

What is distinctive about world-systems analysis is its inclusion of all forms of labor as part of the capitalist world-economy. Rather than viewing household and domestic work, subsistence production, informal labor, and home-based production as forms of precapitalist relations, Wallerstein regarded such labor forms as situated squarely within the capitalist world-economy and contributing to its reproduction—while acknowledging, too, that such labor forms could be defense mechanisms against predatory or stagnating capitalism. In more recent years, as we observe the varied forms of “flexible” and “feminized” labor and the “gig economy” that neoliberal capitalist globalization and political elites have introduced, along with the struggles and strategies of households (or working families) around rising costs of healthcare, schooling, food, and utilities, we can appreciate the insights that Wallerstein and his colleagues brought to the discussion of labor, households, and the world-economy.

Without a doubt, households—through their diverse forms of formal and informal labor—add value to global commodity chains. And it is just as well that Wallerstein differentiated household from the kin-ordered family. Like household, family—in all its diversity—is situated within, and vulnerable to, the vagaries of the capitalist world-economy, contributing labor that is both waged and unwaged and receiving various transfers. And yet it has other features: as part of the “ideological state apparatus” (Althusser 1971), it plays a key role in the reproduction of capitalist relations of production; it is subject to laws, policies, and norms that emanate largely from the state while also helping to legitimate or reinforce that state; it is a site for conflict as well as cooperation; it can provide “a haven in a heartless world” (Lasch 1977).

The family is an institution that reflects broader social inequalities, especially those between women and men (and girls and boys), which in turn are reinforced by laws and policies as well as by the manner in which a particular social formation is situated within the world-economy’s zones

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5 Curiously, the book does not refer to Kathryn Ward’s publications, from her early work on fertility in the world-system (Ward 1985) to her edited volume on women’s work and global restructuring (Ward 1990).
and takes part in global commodity chains. A “typical” family in Sweden is rather different from a “typical” family in Saudi Arabia.

As I have argued elsewhere (Moghadam 1993, 2020), family is a key social, legal, and discursive institution in the Middle East/North Africa context—it is present in constitutions, personal status codes (or family laws), childcare and elder care, kinship-based welfare outside formal employment arrangements, control of female mobility and sexuality, and contestations between feminists and Islamists. In MENA states, codified restrictions on women’s mobility and inheritance have implications for women’s citizenship and household wellbeing as well as for capital accumulation and type of capitalist relations. In other parts of the world, too, family remains salient in national discourses and welfare policies; as Shire and Nemoto (2020) have discussed in their work on Germany and Japan, family plays a role in the reproduction of what they term the conservative gender regime.

In what follows, I do not elaborate on the nature of the family and family laws across different types of gender regimes. Rather, I now turn to the interstate system and draw on Wallerstein’s theoretical contributions to discuss the travails of Iran and Tunisia—two very different polities within the Middle East/North Africa region (MENA).

**Gender Regimes, MENA, and the Capitalist World-System**

In a recent article (Moghadam 2023), I connect gender regime theorizing and world-systems analysis to show how the capitalist world-system influences the institutional domains—polity, economy, civil society, and violence (as per Walby 2020) or family (as per others)—that constitute a gender regime. I argue that gender regimes are not only influenced by type of modernization and depth of democracy (Walby 2009) but also are shaped by the economic zone within which they are located, by links to global commodity chains, and by relations with the world-system’s hegemon. In other words, world-systemic processes matter for gender regime types and trajectories, including the stagnation and regressions to which feminist scholars recently have drawn attention (Verloo 2018; Walby 2018, 2020; Arat 2022).

Tunisia and Iran have very different polities, civil societies, and economies, and yet both have been adversely affected by world-systemic processes, with profound implications for the trajectory of their respective gender regimes. Tunisia is the one country that emerged from the 2011 Arab Spring protests with a procedural democratic transition, but it experienced an abrupt halt in 2021. Iran chooses not to abide by the directives of the hegemon and has been subjected to punishing sanctions by the world-system’s hegemon as well as the abrogation of an international treaty.6

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6 The Joint Comprehensive Plan of Action (JCPOA), also known as the Iran nuclear agreement, was concluded in 2015, after several years of negotiations—involving Iran, the Security Council’s five permanent members, and Germany, together with the European Union—to put a halt to Iran’s uranium enrichment program and possible development of a nuclear bomb. Unilaterally abrogated by the Trump Administration in 2018, it was not revived by the Biden Administration.
In the past, revolutions and democratic transitions helped to transform the gender regime in an egalitarian direction. Examples are the Bolshevik revolution of 1917 and the victory of the Chinese revolutionaries in the 1940s; the flurry of third world revolutions from Cuba and Vietnam to Nicaragua; and the “third wave” democratic transitions in southern Europe in the late 1970s. Iran’s 1979 revolution had very different outcomes for women, with discrimination codified in an array of laws and policies, but there were episodes when significant domestic reforms as well as changes in relations with the hegemon were possible, especially after the 9/11 attacks by 19 Arab terrorists. Those possibilities were foreclosed first by U.S. president Bush’s designation of Iran as part of an “axis of evil” and later by Trump’s withdrawal from the 2015 nuclear agreement and application of “maximum pressure sanctions.” Deterioration of economic conditions led to protests and clampdowns in 2017–2019, numerous casualties from the COVID-19 pandemic, and renewed enforcement of hejab strictures—which led to the death in police custody of a young woman from Iran’s Kurdistan province, Mahsa Jina Amini, in September 2022.

In Tunisia’s case, its 2011 political revolution, part of the so-called fourth wave democratic transitions, took place in an untoward global economic environment and did not receive the international financial assistance necessary for an effective and sustainable democratic development strategy (Mako and Moghadam 2021). Instead, the country endured over a decade of high unemployment, declining foreign investment and receipts from tourism, an increasingly dangerous neighborhood after the NATO assault on Libya and the internationalized civil conflict in Syria, growing indebtedness, the effects of the COVID-19 pandemic, rising prices and shortages from the Russia-Ukraine-NATO war, and the attendant political travails. In June 2021, the country’s new president invoked an obscure constitutional article to fire the prime minister, suspend parliament, and call for new elections and a new constitution. He also set aside a proposal for women’s equal inheritance rights and other liberties (Moghadam 2022).

The World Bank and the IMF continue to recommend that Tunisia receive loans conditional on “reforms,” with a focus on tackling “corruption” in order to put its economy back on a growth trajectory. But if Wallerstein (1974: 390) was correct in categorically stating that “there is no such thing as ‘national development’” (albeit in the context of a more complex critique), can Tunisia be blamed for its predicament? Should the onus for reforms be borne by Tunisia, or by the institutions of global governance, which continue to do the bidding of the hegemon and to reinforce

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7 By early 2023, the nationwide protests that ensued throughout fall 2022 following Amini’s death had subsided, though the authorities were no longer enforcing compulsory hejab. At the same time, Iran’s rapprochement with its longtime rival, Saudi Arabia, was brokered by China. Both the continued U.S. pressures on Iran and the role of China in the restoration of diplomatic relations between Iran and Saudi Arabia are aspects of hegemonic decline and the world-system’s transition—which were discussed by Wallerstein in many publications.

8 To be honest, I have never quite accepted Wallerstein’s adamant denial of the existence of a socialist world-system (see discussion, Wallerstein 1974: 396–398; see also Chase-Dunn 1999: 203–205). This is not the place to elaborate, but although I can understand the theoretical basis for that position, it seems to deny the very real political implications of the socialist/communist alternative and the ensuing forms of cooperation and solidarity that existed until the demise of the USSR. At the same time, Wallerstein seems to have recognized that the Communist bloc ensured a certain balance and equilibrium in the world-system.
global hierarchies? In 2023, EU countries were pledging financial support to Tunisia to curb irregular migration.\(^9\) Where were they when Tunisia’s democratic transition needed financial support for political stability and sustainable development?

Introducing a world-systems lens elucidates the structural forces behind the reversals in women’s participation and rights in both countries. In Iran’s case, an emergent semiperipheral state challenges the hegemon, incurring economic and financial penalties that in turn strengthen domestic right-wing forces and impede progress on women’s participation and rights. In Tunisia’s case, a widely admired democratic transition and emergent egalitarian gender regime is imperiled by the country’s small economy, tangential links to global commodity chains, and dependence on external investments and loans. Peripheral or semiperipheral countries with the capacity to develop a more modernized public gender regime have been subjected to forms of pressure—hard power or soft power, coercive or non-coercive pressure—by the core or hegemon. Iran is a case in point (another is Venezuela). This is not to deny that polities bear much blame for mismanagement of resources or for discriminatory laws against women (Iran especially). The argument I make, however, is that economic, political, and military control at the level of the interstate system often creates or exacerbates misguided national-level economic decision-making or leads to the reinforcement of patriarchal, authoritarian rule. As the primary source of inequality and hierarchy at the global level, the capitalist world-system affects national-level class relations and the institutional domains that constitute a gender regime, with variations across economic zones. Starting with the capitalist world-system, therefore, enables the feminist scholar to acknowledge an ontological “regime of inequality” that shapes all other inequality regimes. It explains uneven (economic) development, including the uneven development and unfolding of gender regimes within social formations and across the global formation (Moghadam 2023).

Gender regimes—including households and families worldwide—are encountering the effects of conflicts and wars, inter-state rivalries, increased militarization, climate change, rising food prices, deteriorating wages and working conditions, and declining support for women’s empowerment programs. The current confluence of crises reflects what Wallerstein described then and more recently as the “chaotic situation” of a world-system in transition that has veered so far from equilibrium that it is unlikely to return (Wallerstein 2013: 35). What will follow is as yet unclear, but the “future demise of the world capitalist system” (Wallerstein 1974) and its replacement by a multipolar order that is also more peaceful and egalitarian would be a welcome outcome.

**Concluding Remarks**

I first encountered Wallerstein’s work as a graduate student at The American University, in Washington, D.C., where one of our sociology professors, Barbara Kaplan (1978), edited a book

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on world-systems analysis that included a chapter by Chase-Dunn (1978). At the time, I was more immersed in Marxism (and in Iranian revolutionary politics) and soon discovered feminist scholarship, which led me to appreciate the operations of gender across time and space. Having read Engels’ classic *Origins of the Family, Private Property, and the State*, my introduction to Gerda Lerner’s *The Creation of Patriarchy* launched me on a new scholarly trajectory, which led to comparative work on development, revolutions, and gender dynamics in Iran and Afghanistan, and field research in Kabul in early 1989. At some point in the early 1990s I began to read *The Modern World-System*, and invited Joan Smith to a conference that I was organizing at the United Nation’s WIDER Institute, in Helsinki, Finland. I became a member of the ASA’s PEWS section and would see Wallerstein at various sessions, although I have had more frequent interactions with Chase-Dunn.

Given my area specialization (initially Iran and Afghanistan, then the Middle East and North Africa more broadly), Wallerstein’s grounding in the political economy and political sociology of Sub-Saharan Africa and its independence movements (e.g., Wallerstein 1964) resonated with me and, in an important sense, justified my continued work on the MENA region and states. In the mid-1980s, Wallerstein may have been hasty in some political predictions, such as a “dead” NATO, but he was correct to note that “militarism is in,” that “the welfare state will be contracted,” and that “the days of ‘mature global liberalism’ are over” (Wallerstein 1984: 75–76). He was entirely correct in stating that “the collapse of Leninism…has removed the last major politically stabilizing force within the world-system” (Wallerstein 1991: 14, emphasis in the original) even if he warned that the consequences might not necessarily be good news for opponents. I always appreciated his progressive political stances and commitment to the liberation of peoples and places, his respect for and references to African and Arab intellectuals, his call for “the restoration of the universal reality of liberty and equality” (Wallerstein 1991: 199), and his part in the “Group of 19” signatories to the 2005 *Porto Allegre Manifesto*. As he stated in his “intellectual itinerary,” there is no conflict between intellectual analysis and political action. Wallerstein’s own intellectual contributions remain powerfully relevant. And it pleases me to know that his work resonates with students.

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10 I was in Kabul as the last of the Soviet troops were leaving. The Red Army presence had been requested by the beleaguered government in 1979 and had been prolonged by U.S. military aid to the Islamists via Pakistan. It is worth noting that after the Soviet troop withdrawal, the left-wing Afghan government remained in place for nearly three years. Much later, the collapse of the U.S.-backed Ghani government occurred before the ignominious U.S. and NATO troop withdrawal—after a 20 year presence.

11 See [ZNet Commentary: Porto Alegre Manifesto (archive.ph)](https://archive.ph)
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