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Onward To Liberation!—Samir Amin and the Study of World Historical Capitalism

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Abstract

This article presents theoretical and methodological insights of world-systems analysis via the works of Samir Amin and his major interlocuteurs. It is argued that Samir Amin was central to sparking the study of world historical analysis, and offered unique contributions to the discussions that emerged. It is demonstrated that this is due to Samir Amin's ability to balance structure, specificity, and historical contingency, as well as his enduring commitment to human liberation.

Keywords: World-Systems Theory, World Historical Political Economy, Decolonizing the Social Sciences



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“No liberation is ever victorious—Discuss.” So goes a 2019 Facebook post by South African legal scholar, Tshepo Madlingozi. I don’t hesitate to use a Facebook post to begin this essay because it is about the sociopolitical thought of Samir Amin, an intellectual who was unrestrained in the topics he broached, theoretical tools he employed, and communication media he used. Amin’s *problématique*, I contend—running through his entire oeuvre—can be encapsulated in a revised version of Madlingozi’s post: “No liberation—thus far—has been victorious.” Whether contextualized in impoverished countries or regions, communist countries, former communist countries, emerging countries, rich countries, or the world as a whole, Amin’s primary object has been the liberation of peoples the world over, and understanding why liberation of the majority remains unachieved. Ranging in “voice”—by which I mean Amin the social scientist, Amin the policy analyst, and Amin the strategist—as well as focus, Amin’s various works have spoken to popular and intellectual debates current in various historical moments. All of this driven by the ultimate goal of human liberation via large scale, global political-economic change.

As such, I argue that the oeuvre of Samir Amin cannot be discussed in isolation, or without interfacing his contributions with those of his major interlocutors. In the first part of this paper, I trace concepts and debates which I see as elemental to understanding the world as a single but complex whole—a discussion which I believe is both more elusive and more urgent today than ever before.

Samir Amin is often referred to as a Marxist. But as I show here, his thinking sparked and informed much of what would come to be known as world-systems/world historical analysis. World-systems analysis is *post-Marxist* rather than *Marxist* in that it draws from Marx’s historical materialism and theoretical concepts without reifying Marx’s thought as a reading of world history. Those adhering to the latter approach—referred to by Amin (1989) as “Marxology”—I refer to here as Marxists. I demonstrate that passing through Marx, conventional economic history, and historical sociology, the collective oeuvre of Samir Amin and his interlocuteurs is eclectic theoretically and methodologically. Samir Amin was central in sparking world-systems analysis and his engagement with world-systems interlocuteurs combines elements of each while also surpassing them—always in the service of understanding long term social change to build toward liberation.

In the second section of the paper, I argue that key to Amin’s pathbreaking thought is his methodology, or more specifically, his analytical ability to balance *structure*, *specificity*, and *historical contingency*. I show how this analytical ability is rooted in some of his most basic theoretical constructs.

In the final section of the paper, I draw out the unapologetically political nature of Samir Amin’s work. In face of the fifth decade of neoliberal capitalism, the political task of unraveling humanity from capitalism and nurturing what Marta Harnecker (2019) calls “a new revolutionary subject” is far from complete. Now all with the ancestors, Amin and his interlocutors were engaged in this task until their last words and works. As a former student of Giovanni Arrighi, Immanuel Wallerstein, Anibal Quijano, and Samir Amin, this piece is a tribute to them and a contribution through them to the persisting challenge of human liberation.

Understanding *the Whole*

As the combined ecological, socioeconomic crisis comes to the fore globally and the post-modern/post-structuralist wave wanes, there is renewed thirst internationally to understand *the global* and the workings of the capitalist world-economy. Similarly re-emerging is the theme of decolonization, one that last emerged in the 1950s and 1960s. Rather than starting from scratch, I believe it is fruitful to re-examine how these questions were previously framed and considered by Samir Amin and a relatively small group of thinkers.

Responding to modernization theory of 1950s mainstream economics, intellectuals, mainly of Africa, Latin America, and the Caribbean, asserted that varying levels of *development* in countries of the world were a product of historical, sociopolitical processes. Modernization theory was rooted in a reading of the development of Western European countries devoid of political and historical analysis of the mechanisms by which wealth is accumulated. Based on modernization theory, economic models of development were being proposed by economists largely of Europe for newly independent states of Asia and Africa, as well as for older post-Independence states of Latin America. André Gunder Frank's *The Development of Underdevelopment* (1966), Giovanni Arrighi's *The Political Economy of Rhodesia* (1968), Samir Amin's *L'Afrique de l'Ouest bloquée* (1971), Anibal Quijano's *Nationalism and Capitalism in Peru: A Study in Neoimperialism* (1971), and Walter Rodney's *How Europe Underdeveloped Africa* (1974) are examples of discussions within and between radicals of Africa, the Caribbean, and Latin America in the 1960s and 1970s.

Many of these works have been seen as part of dependency theory, which is sometimes collapsed with world-systems analysis. In "A Note on the Death of André Gunder Frank" (2005), Amin cites his 1960s and early 1970s work on Africa and Asia as reaching "parallel conclusions" to early 1970s dependency theory of Latin America. For Amin, Gunder Frank, Quijano, and others were presenting an alternative to modernization theory as well as "Marxist orthodoxy, as represented by the Communist Parties," the latter of which characterized Latin American countries as "semi-feudal." By the mid-1970s, however, as Amin puts it, he, Arrighi, Gunder Frank, and Wallerstein established "the gang of four", elaborating together the "new globalized economic structure" that "was just becoming perceptible."¹

Having spent time at the University College of Rhodesia and Nyasaland as well as University College of Dar es Salaam, Giovanni Arrighi and Immanuel Wallerstein had engaged with African critiques of modernization theory and brought them into their theorizing of hegemonic structures and the world-system. Wallerstein's 1974 volume, *The Modern World System: Capitalist Agriculture and the Origins of the European World Economy in the Sixteenth Century* became the most known globally. In it, Wallerstein argued that capitalism is a historical system that has

¹ Richard Yidana (cited by Tomich in Marques and Parron, 2019) highlights the dynamism of world-systems methodology through a critique of the dependency approach in Isaacman's 1996 book, *Cotton is the Mother of Poverty*. Isaacman draws simple links between raw material production in Mozambique and the textile industry in Portugal; in a word, an imperial power sucking its colony dry. A world-systems approach puts the Portuguese textile industry in the context of world textile production, portraying Portugal as a dying economy absorbing as much as possible from the colony to survive, and linking this to heightened struggle for independence in Mozambique.

gradually built certain countries as *core*, some as *semi-periphery*, and most as *periphery*, from 1492, the time of European arrival in what has come to be known as the Americas.

Wallerstein's theoretical framing was largely drawn from *L'accumulation à l'échelle mondiale*, Samir Amin's 1970 volume, in which Amin argued that Marx's bourgeoisie and proletariat could be mapped to nations of the globe rather than merely as classes within certain nation states. In the book, Amin defined the notion of "le système capitaliste mondiale" (Amin 1970: 13), or "the capitalist world-system" (Amin 1974: 3), contesting the concept of dualism in modernization theory whereby countries or/and economic sectors were labelled and understood as either capitalist, or pre-capitalist and under-developed. Amin underlined that "transfers of value" (Amin 1970: 14) occur from so-called underdeveloped countries to so-called developed countries and these are the essence of capitalist accumulation on a world scale. These transfers, often hidden, are a function of varying forms of "primitive accumulation" (1974: 3). Amin thus argued that varying forms of primitive accumulation belong to the study of contemporary world capitalism as well as its history. With a nod to Gunder Frank's 1966 essay, "The Development of Underdevelopment," Amin stressed that what development economists labelled underdevelopment was developed through sociopolitical processes central to understanding economics.

With his notion of transfers of value, or varying forms of primitive accumulation, Amin reinterpreted Marx's concept of primitive accumulation and took further an idea first presented in Amin's 1955 statistical thesis, *L'utilisation des revenus susceptibles d'épargne en Egypte de 1939 à 1953*. This is the idea that rather than a lack of surplus production in the so-called underdeveloped world, as development economics would have it, what is at play in colonial and postcolonial societies is the use of surplus in ways not economically and socially productive for the majority. In the thesis, Amin (cited by Amin 1970, 1974) demonstrated that though profits amounted to one third of national income in Egypt during the colonial period, only 14 percent of this was re-invested productively (in family businesses, or public shares and stocks in other companies). The remainder was used for luxury consumption (38 percent), to buy real estate (34 percent), and to buy gold and other liquid capital (15 percent). Paul Baran (1957) generalized and incorporated this idea in the landmark essay, *The Political Economy of Growth*.

Amin (1970, 1974) further elaborated that the forms and uses of surplus in postcolonial countries vary with the nature of socioeconomic formations and the mechanisms by which postcolonial countries were integrated in the capitalist world-system during or/and prior to formal colonialism. In turn, Amin called for a historical explanation of the genesis of the world capitalist system from which a theory of the international division of labor could be constructed. Amin stressed that while Lenin's *Imperialism: the Highest Stage of Capitalism* (1917) had traced the formation of monopoly capitalism in so-called developed countries, and Baran and Sweezy's *Monopoly Capital* (1966) had updated the analysis to the twentieth century, both works examined monopoly capitalism without studying transformations in the periphery in connection with those of the center. Noting Arghiri Emmanuel's (1970) formulation of *unequal exchange* as only one of many forms of transfer from impoverished countries to richer countries, Amin called for a "general

theory of capitalist formations" (Amin 1974: 21) to understand successive forms of primitive accumulation in relation to transformations taking place at the center.

In *The Modern World System Capitalist Agriculture and the Origins of the European World Economy in the Sixteenth Century*, as suggested by the title, Immanuel Wallerstein (1974) picked up on Amin's question of historical origins of the world-system, but much less so on the question of the variety of mechanisms by which peripheral countries were integrated into the global division of labor. Wallerstein argued that rather than limited to the late nineteenth century onward, Lenin's concepts of *imperialism* and *monopoly*, and that of *unequal exchange* of Mihail Manoilescu (1929) and Emmanuel (1970), could be stretched back to the sixteenth century. Weaving together a wide range of separately told histories—a novel methodology for the time—Wallerstein argued that a *world-system* came into being in the sixteenth century and this was the beginnings of world capitalism increasingly being recognized in the 1970s as stretching over and connecting the entire globe.

Breaking from the bulk of Western social scientists of the twentieth century, including Marxists, Wallerstein (1974) argued that entities typically considered "social systems"—tribes, communities, nation states—were not total systems, and rather belonged to "the modern world-system." In turn, he defined the modern world-system as containing a multiplicity of cultures and political systems integrated into an extensive division of labor within a single world-economy. Wallerstein asserted that prior to the sixteenth century, world-economies had existed but were unstable and tended to either disintegrate or be converted into empires. Only the modern world-system and its accompanying world-economy had survived 500 years without being transformed into a *world-empire*.

With regard to unequal exchange, Wallerstein (1974) argued that societies on the periphery of what is now Western Europe were incorporated into the world-system in the sixteenth century through trade in bulk goods based on unequal exchange. In the periphery of the sixteenth century world-system he thus included Poland, Hungary, and Brazil. The Ottoman Empire and Indian sub-continent were not part of Wallerstein's sixteenth century world-system because he saw them as trading in "preciosities" rather than bulk goods and were hence not subjected to unequal exchange. Over and above Wallerstein's inclusions and exclusions and their accuracy, as Wallerstein insists in the Prologue of the 2011 edition of his seminal work, the main purpose of his distinction between bulk goods and preciosities was to lay the basis for understanding that the world-system was not global from the outset.

If Amin, Gunder Frank, and Emmanuel were major theoretical inspirations of Wallerstein, historian Fernand Braudel was the major methodological influence. Writing shortly after the end of World War II, Braudel, and the Annales School of which he was a part, saw history as tracing the confluence of *conjonctures*, or the rhythms of life and growth of science, technology, institutions, and concepts. The confluence is key. Different from the English language notion of *conjuncture*: the coming together of different elements at a fixed point—the French notion of *conjoncture* is the slow flow of parallel processes. In their paralleling flow, these processes form

a structure of the *longue durée* (Braudel 1980: 31), thus transcending social and economic conjonctures.

For Braudel, *structures* can be geographical frameworks, biological realities, limits of productivity, or mental frameworks that endure through long periods (*longue durées*). These extend over and above individuals and the momentary events that are the typical subjects of history writing. Braudel cites for instance, “mercantile capitalism in Western Europe” as a structure that lasted over the *longue durée*, despite “a thousand reversals and ruptures” which were “altering the face of the world,” leading to industrial revolution (Braudel 1980: 33).

Through the 1980s, Giovanni Arrighi built on and refined Wallerstein’s analysis, using different aspects of Braudel, Amin, Baran, and Sweezy. Also inspired by the internationalist graduate student body of the Department of Sociology at the State University of New York in Binghamton—where both Arrighi and Wallerstein taught—Arrighi published *The Long Twentieth Century* in 1994. Arrighi combined a reconfiguring of Gramsci’s concept of hegemony to a world scale with Braudel’s notion of three tiers of economy, to explain both the invariance and evolution of the modern world-system from its beginnings in late-medieval Europe to the present. Braudel’s bottom tier is *material life*, the “soil into which capitalism thrusts its roots” but which it can never fully penetrate. The middle is *market economy*, mostly coordinated through demand, supply and prices via “many horizontal communications between different markets.” The top tier is *the anti-market*, where the state and large capitals supersede market relations of supply and demand through monopoly powers. All tiers are dependent on those below, while concurrently dominating them (Braudel 1982: 229-230; Arrighi 1994).

Like Amin and Wallerstein, though in somewhat different ways, Arrighi also parted from Marxists. Arrighi underlined that rather than the transition from feudalism to capitalism in Europe—a major topic of debate among Marxists—the principal transition to make sense of is the one whereby states and capitalist enterprise (i.e., traders and financiers) fused to form the anti-market, or “capitalism-as-world-system” (Arrighi 1994: 10). Arrighi argued that only in Europe did this fusion occur, propelling European states towards “the territorial conquest of the world and the formation of an all-powerful and truly global capitalist world-economy” (Arrighi 1994: 11).

Arrighi (1994) posited four “systemic cycles of accumulation” led by key Western European powers or hegemons: the first (Genoese) cycle circa 1450-1640; the second (Dutch) cycle, circa 1640-1790; the third (British) cycle, circa 1790-1925; and the fourth (U.S.) cycle, circa 1925-present. Each systemic cycle of accumulation consists of a phase of material expansion followed by a phase of financial expansion. The phase of material expansion is one of continuous change, whereby the capitalist world-economy grows steadily along a well-defined path. During this phase, the activity of capitalists tends to be in productive sectors, as aggregate demand and profit rates increase steadily and investment follows in pace. A phase of financial expansion is one of discontinuous change, whereby the established path of economic development has reached its limits, and the world-economy shifts onto another path via radical restructuring and reorganization.

During the latter phase—given the ongoing nature of the pursuit of profit—the largest of capitals are invested in speculative activity because demand and rates of profit in known productive

sectors shift to a downward curve. Arrighi cites figures of foreign exchange flows and trade in goods in the years 1979 and 1985 as examples of evidence of this shift. In 1979, foreign exchange trading around the world (i.e., speculative investment) amounted to 17.5 trillion U.S. dollars, while the total value of world trade (i.e., productive investment) was a mere 1.5 trillion U.S. dollars. Five years later, foreign exchange trading expanded to 35 trillion, close to 20 times the value of world trade, which had only increased by 20 percent (Gilpin 1987; Arrighi 1994). In the last decade or so, Arrighi's notion of *financial expansion* of the fourth (U.S.) systemic cycle of accumulation has come to be known as *financialization*, as mainstream economists began discussing it some 20 years after the publication of Arrighi's seminal work.

For each systemic cycle of accumulation and each phase of expansion within them, Arrighi traced key political, military, production, and financial relations among what is now conceived of as Western Europe, and between Western European hegemons and parts of Latin America, Africa, and Asia. Arrighi demonstrates how these relations led, by the nineteenth century, to the establishment of a stratified world-economy composed of a small number of wealthy nation states and a large majority of impoverished nation states. The layers of economic, political, and military relations, over multiple centuries connote, in the world-systems approach, that all of these nation states figure into "a single, capitalist whole, both in abstract and concrete terms" (Valiani 2012: 14-15). This is arguably the most stark difference between the world-systems approach and that of most Marxists.

In contrast to capitalism as a historical system gradually incorporating various parts of the world from the fifteenth or sixteenth century, Marxists see capitalism as limited to richer countries where the majority are proletarians separated from the means of production. This view is based on a stage theory of history in which all societies inevitably follow phases of development similar to those of *Europe*. Maurice Dobb's *Studies in the Development of Capitalism* (1947) is an elaborate version of Marxist stage theory, while Bill Warren's *Imperialism: Pioneer of Capitalism* (1980) is more crude. An example of the concrete, present day implications of this approach is the South African Communist Party's (SACP) support for post-apartheid policies and state facilitation of the enrichment of Black capitalists. In an article celebrating Samir Amin at 80, Horace Campbell (2011) explains that in the SACP rendition of Marxist stage theory, a Black bourgeoisie is necessary to "develop" the majority of the population into proletarians. Only from there can socialism become a possibility in South Africa.

In addition to contesting Marxists, a major ideological thrust of Wallerstein and Arrighi was to challenge the eurocentrism of Karl Polanyi's *The Great Transformation: The Political and Economic Origins of our Time* (1944). Polanyi's work is a far reaching analysis of the political-economic mechanisms and consequences of British free trade, or what Arrighi terms, for analytic purposes, the third (British) systemic cycle of accumulation. The major shortcoming of Polanyi's treatise is that though its subject revolves largely around the socioeconomic history of England, Polanyi includes little about relations between England and the colonies and dominions that were constitutive of the British Empire and the economic rise of England.

Janet Abu-Lughod (1989) also tackled eurocentrism and *the whole* in her work, *Before European Hegemony: The World System A.D. 1250-1350*. For Abu-Lughod, it was eurocentric to root the development of traders, financiers, and organized work/production processes, or as Marxist stage theorists labelled them, *protocapitalist elements*, in qualities particular to European culture. She therefore traced the thirteenth and fourteenth century “ancient world-system” and its “structure of trade relationships and banking practices” that preceded the Atlantic-centered world-system. Abu-Lughod identified eight subsystems interlinked via three major circuits: The “Middle Eastern,” “Far Eastern,” and “Western European” (Abu-Lughod 1989: 4).

In all three, merchant wealth, independent of the state, was crucial to the formation of finance and other economic institutions, for instance, credit and mechanisms for pooling capital and risk. Within the circuit of Western Europe, Abu-Lughod (1989) argues the key role and higher level of sophistication of Genoese and Venetian merchants was due to connections with “the East” during the so-called Dark Ages of Europe (from circa 500 AD), and lessons learnt by Italian merchants from merchants of the East. The rise of “head partners” based in today’s Italy, and managers and assistants running offices abroad, in the thirteenth century, signified a “commercial revolution” that led to the advent of what Marxists stage theorists termed “mercantile capitalism” (Abu-Lughod 1989: 91).

Abu-Lughod’s analytical history of the textile and sugar industries in the Middle Eastern circuit exemplifies the links she makes between circulation and production, as do world-systemists generally, in contrast to Marxists, who uphold the primacy of production.² Sugar, for instance, in thirteenth and early fourteenth century Egypt and Syria, linked rural production to industrial economies. Produced in plantations, sugarcane was refined and manufactured into sweets for home consumption as well as export to Italy, Southern France, Catalonia, Flanders, England, and Germany (Abu Lughod 1989). Mamluk amirs and sultans were heavily involved throughout the sugar industry. At the crux of what is to be taken from all this, for Abu-Lughod, is that surpluses were being produced, through advanced organization of labor and work processes involving the participation of states (Abu-Lughod 1989).

After sparking much of world-systems analysis, Samir Amin re-sparked it by offering an entirely new twist in his 1991 article, “The Ancient World-Systems versus the Modern Capitalist World-System.” Using his reformulation of Marx’s concepts of modes of production and centralization, Amin drew a fundamental distinction between the modern world-system and ancient world-systems.

Amin locates ancient world-systems in “the tributary mode of production” (Amin 1991: 351) based on peasant labor and some form of dominant ideology stemming from religion. Within this mode, the world is made-up of distinct regions that are self-sufficient, and there is very little centralization of surplus on a world scale. In contrast, the modern world-system is characterized by “the capitalist mode of production” based on labor that is “free” and an ideology of

² See for instance *Agrarian Class Structure and Economic Development in Pre-Industrial Europe*, by Robert Brenner (1976).

“economism” rising from “the world-wide law of value” (Amin 1991: 352-353). The world-wide law of value operates through a truncated market that integrates goods and capital globally, but not the labor force. Surplus is thus centralized on a world scale, and regions of the world become polarized while continually relating to one another, whether in periods of economic up-swing or down-turn.

Within the period of ancient world-systems, Amin (1991) points out there were outlying areas. These areas were feudal and did not relate to the empires of China, India, North Africa, and West Asia analyzed by Abu-Lughod. In addition, these outlying areas were characterized by a relatively late development of “the state.” The bulk of Western Europe, or what Amin calls “the Europe of the Barbarians” (Amin 1991: 355), as well as Japan, were two such areas. When these outliers did develop states, rather than linking to a tributary dominant class, which didn’t exist, the late states—taking the form of absolute monarchies—merged with merchants and used peasantries evolving toward the market as the material basis upon which to strengthen themselves. In brief, the dependency of late Western European states on protocapitalist elements allowed the latter to burgeon, a dialectic process which led to the formation of the capitalist mode of production, or what Arrighi later called *capitalism-as-world-system*.

Ideologically, what is significant about Amin’s contribution on modes of production is its challenge to political/economic perspectives based on the assumption of superiority of Western Europe and Japan rooted in particular cultural or other traits. Amin demonstrated that it was actually a form of *backwardness*, combined with a contingency of history, that eventually led to the global rise of Western Europe and Japan. Rather than being figments of scholarship of the past, views that consciously or subconsciously assume the exceptionality and superiority of Western Europe and Japan are still quite dominant, and making resurgence, including in many parts of the Majority World.³

Regarding protocapitalist elements, Amin (1991) emphasizes that though these existed throughout ancient world-systems, they were not dominant. Further, he argues that in the Arab world, a tributary-mercantile state began to evolve, which may have led to the dominance of protocapitalist elements, but this process was halted with the merging of late states with protocapitalist elements in Barbarian Europe. In the methodology of tracking multiple parallels of Braudel’s conjuncture, Amin highlights that this merging unfolded in Western Europe in tandem with a cultural revolution that shifted the generation of ideas away from metaphysics. Through this revolution evolved the systematic use of “scientific thinking” for the development of the forces of production and the formation of secular society. Notably, Amin (1989) distinguishes between scientific thinking, a force from the sixteenth century emerging from the Renaissance and Enlightenment, and *technology*, an empirical practice that has existed throughout humanity. And identifying one further parallel process in the conjuncture, like Wallerstein and other world-

³ Terms for colonized countries have evolved from “third world” to “developing world” to “global South,” reflecting various biases emanating from rich countries. The terms used here, “majority world,” is used here as it is most in tandem with a world historical approach. The more abstract term, “periphery,” is used when referring to workings of the world-capitalist system.

systemists, Amin ties in the European conquest of the Americas: “The recognition that the essential elements of capitalism crystallised in Europe during the Renaissance suggests 1492, the beginning of the conquest of America—as the date of the simultaneous birth of both capitalism and the world capitalist system, the two phenomena being inseparable” (Amin 1991: 354).

Amin’s interpretation of eurocentrism follows from this formulation. As he puts it in *Eurocentrism*, the work through which he coined the term now used widely: “Simultaneously, Europe becomes conscious of the universal scope of its civilization, henceforth capable of conquering the world” (Amin 1989: 71). Such a consciousness, in other words, had not been present in previous systems. In turn, a global conquering similar in nature to that of Western Europe did not occur. Further, for Amin, Eurocentrism arises from the consciousness in Western Europe of the universal scope of its civilization, leading to the construction of social sciences and humanities revolving, in different ways, around the development of Europe. An in-depth exploration of this connection—between the historically specific consciousness in Western Europe and the production of knowledge—was later elaborated in Wallerstein’s 1996 book, *Open the Social Sciences: Report of the Gulbenkian Commission on the Restructuring of the Social Sciences*.

Linking back to the theme of “liberation,” Amin warned against romanticizing “the precolonial” in the search to decolonize: “The truncated universalism of capitalist economism, necessarily Eurocentric, must be replaced by the authentic universalism of a necessary and possible socialism...the critique of Eurocentrism must not be backward looking, making ‘a virtue of the difference,’ as the saying goes” (Amin 1989, cited by Amin, 1991: 353). Amin’s overarching notion of eurocentrism thus beckons the liberation of knowledge production from the strictures of idealized distant pasts and the hegemonic past-present. Building from and as part of these world-systems discussions of global power, Boaventura de Sousa Santos (1992) argues for “a supercession of the dichotomy between the natural and the social sciences,” the reconstitution of local cognitive projects into “illustrated total knowledge”—all toward an “emancipatory praxis.”

Some thirty years later, in something of a reversal of Marx’s call to transform the world rather than understand it, de Sousa Santos urges that the construction of new understandings are required in order for people to transform the world. de Sousa Santos (2019) envisions “epistemologies of the South” that replace eurocentric “monocultures” of the ivory tower with “ecologies” informed by knowledge emanating from contemporary political struggles.

de Sousa Santos frames the monocultures of which we need to rid ourselves as: the monoculture of science, the monoculture of naturalized difference and hidden hierarchy, the monoculture of linear time and temporalities, the monoculture of scale, and the monoculture of productivity. The ecologies to construct are: ecology of knowledge (amassing indigenous knowledges with radical/marginalized European knowledge), ecology of differences (without hierarchy), ecology of time and temporalities (away from scarcity of time), ecology of the trans-scale (where “the universal” and “the global” are not greater than “the particular” and “the local”), and an ecology of productivity that balances rights and responsibilities. de Sousa Santos (2019) interprets the ability of youth of the burgeoning climate crisis movement to imagine the end of

the world and not the end of capitalism as symptomatic of a lack of theory that applies to the world, a failure he attributes to the knowledge produced and reproduced in the ivory tower.

Amin's (1989) call for the search for "authentic universalism of a necessary and possible socialism" and de Sousa Santos' proposal to construct struggle-informed epistemologies of the South are constant challenges that will continue to present themselves to individual thinkers given the persisting structure of global power. They are simultaneously a collective endeavor in the making, crucial for a deeper, broader grasping of *the whole*.

Structures of Hegemony versus Relations of the World-Economy

Samir Amin's ability to reach for structures of the world-economy while balancing specificity and historical contingency have much to do with his theoretical constructs. Key to understanding Samir Amin's oeuvre in depth, these constructs are also vital in the pursuit of decolonizing economics. More specifically, Amin's 1970 call for a general theory of capitalist formations remains very much open for the creating and could be instrumental to transformational change in Asia, Africa and Latin America as well as to human liberation globally.

In *Le développement inégal*, Amin (1973a) lays out his basic theoretical categories: *societies*, or *social formations*. Within social formations, Amin locates *modes of production*, *classes*, *forms of surplus*, and *transfer*.

Beginning with Amin's modes of production, "communal modes of production" provide the basis of embryonic class distinction, including through the hierarchical organization of labor. Amin identifies a wide spectrum of communal modes in Africa, for instance, from less hierarchical among the Bantu to the extremely egalitarian as among the Toucouleurs of the Sénégal Valley, the Ashanti of Ghana, and the Hausa of Northern Nigeria (Amin 1976). Regardless of the extent of hierarchy, in all of these societies, all enjoy access to land through the clan.

In the "tributary mode of production" there are two main classes: the peasantry organized in communities, and the ruling class. The ruling class monopolizes the political function of organizing society, usually on the ideological basis of religion, and draws a non-commodity form tribute from peasant communities. In the tributary mode, which usually but not always follows communal modes, all peasants have the right to use land. In contrast, in the feudal mode, peasants do not have the right to use land and the ruling class has the right to appropriate surplus produced on the land. The tributary mode has a history of existence in China, India, Southeast Asia, Mesopotamia, Egypt, Africa, Europe and pre-Columbian America (Amin 1976).

The "slave-owning mode of production" turns both labor and land into means of production. In patriarchal slavery, like that which Europeans found when they arrived in Africa, slaves are part of non-commodity transfers. In other forms, such as Greco-Roman slavery, slave labor entered into commodity circuits. When analyzed globally rather than only from the experience of "Atlantic Europe" (England, France, Spain, Portugal), both the slave-owning and feudal modes have historically existed on the edges of the tributary mode (Amin 1976).

In the “capitalist mode of production,” labor power, land, and exchange relations are commodified. All of production is commodified rather than merely the surplus, as in other modes, and economic centralization occurs to a higher degree. Because labor power is commodified, it becomes relatively more *flexible*, to use a term commonly used today, and people migrate to work in new spaces, integrating the population. Capital, in commodity form, brings about integration of the market through a centralized currency system and wealth circulation. These relations lend themselves to the formation of nations as we know them, though Amin (1976) acknowledges that *the nation* is older than capitalism. “Economism,” or “the ideology of harmonies,” is the political ideology that organizes material life. In other modes, as alluded to earlier, religion typically performs this function (Amin 1976: 24).

Countering the linear, Europe-centered assumption of Marxist stage theorists, Amin is clear that historical sequences may be traced for social formations, but a singular sequence of modes of production does not exist. Additionally, many social formations are a combination of more than one mode of production and the ways in which modes combine vary. Amin thus underlines the absurdity of comparing slavery in precolonial Africa with the Atlantic slave trade and nineteenth century USAmerican slavery. Such comparisons were an endeavor of a good number of economic historians, particularly during the 1970s.

The categories of “surplus” and “transfer” are key when analyzing social formations combining more than one mode of production (Amin 1976: 18-19). In all modes of production, people are divided into classes, and classes are brought together in a conflicted relation. Key to this conflicted relation is the question of who controls the production process, and ultimately, the surplus produced (Amin 1976). The category of transfer is important as the class benefiting from the transfer of the surplus may be entirely different from the class controlling production; for instance, *the comprador bourgeoisie* in many postcolonial contexts. Amin provides the example of merchants of thirteenth to seventeenth century Europe, who transferred values of origins external to Europe (original surplus), stimulating simple commodity production by craftsmen within Europe (secondary surplus). All of this is significantly more elaborate and comprehensive than Marx’s early theorization built around control of the means of production as key.

Amin uses the term “articulation” to describe the role of “ideology” and “political functions” in combining modes of production and organizing material life (Amin 1976: 24). Arguing against economicistic approaches, Amin emphasizes that economic institutions are determining in the last instance, but may not always be dominant. Amin’s method therefore combines aspects of present day anthropology, political studies, economic history, and historical sociology to understand the links between modes of production, classes, ideology, and politics, as well as the dynamics between social groups over time. Such understandings of social formations may be seen as the basis for everything from identifying breaks and continuities in political-economic development, to conflict mediation, to mobilizing around policy demands toward structural change, to formulating socioeconomic development visions that undo inequality—*liberation* writ large.

For Amin, modes of production, classes, forms of surplus, and transfer need to be reconstructed historically for all societies—core and periphery alike. Though the capitalist mode

of production may not be the largest mode in all contemporary societies/countries, it dominates all other modes and all contemporary societies are integrated into a single world-system dominated by the capitalist mode. In turn, the configuration of various modes of production must be analyzed to better understand individual societies as well as the capitalist world-system as a whole. As Amin (1974) underlines in *Accumulation on a World Scale*:

Relations between the formations of the “developed” or advanced world (the center) and those of the “underdeveloped” world (the periphery) are affected by transfers of value, and these constitute the essence of the problem of accumulation on a world scale. Whenever the capitalist mode of production enters into relations with precapitalist modes of production, and subjects these to itself, transfers of value take place from the precapitalist to the capitalist formations, as a result of the mechanisms of primitive accumulation. These mechanisms do not belong only to the prehistory of capitalism; they are contemporary as well. It is these forms of primitive accumulation, modified but persistent, to the advantage of the center, that form the domain of the theory of accumulation on a world scale. (Amin 1974: 3)

Countering the 1950s dualism thesis, which juxtaposed societies or/and economic sectors as governed either by precapitalist modes or the capitalist mode, Amin underlined that all modes of production are reconfigured in relation to each other once the capitalist mode comes into existence.

Amin also differed methodologically from Wallerstein. Wallerstein insisted on the world-system rather than the nation, or social formations, as the unit of analysis. In turn, Wallerstein's world-system has been criticized as teleological and functionalist because of the tendency to reify categories of core, periphery, and semi-periphery. Stated differently, one of the major critiques of Wallerstein's world-system—by world-systemists and non-world-systemists alike—is the use of these categories to explain the histories of particular countries rather than reconstructing the variegated histories of social formations to understand the world-system as a complex whole. In failing to leave space for historical contingency, Wallerstein's world-system became trapped by a notion of *structure* as immovable. Wallerstein thus argued in the early 1990s, for instance, in contrast to Amin and Arrighi, that the transformation of China was merely a move from periphery to semi-periphery and would hence not pose a significant challenge to European-USAmerican hegemony—a claim which Wallerstein would later revise.

Unapologetically Political

The dualism thesis of the 1950s would later be reincarnated in the methodological juxtaposition of *formal economy* and *informal economy* by Marxists and mainstream economists, as well as by anthropologists, geographers, and others. This methodology, and its theoretical underpinnings, remain a barrier to formulating critical understandings of economy not only in theory, but also in applied contexts; for instance, the policy making of intergovernmental bodies like the International Labour Organization, the African Development Bank, and the New Development Bank of the BRICS.

Partly in response to this persistence, in an article titled “Coloniality of Power, Eurocentrism, and Latin America,” Anibal Quijano (2000) reformulated many of the ideas that he and Amin and others had been part of generating in the 1970s. Quijano posited the *assemblage* of all forms of control and exploitation of labor as central to historical capitalism, including systems of appropriation and distribution of the fruits of labor. Quijano’s forms are: slavery, serfdom, petty-commodity-production, reciprocity, and wages. Quijano argues that these forms were reborn with Atlantic Europe’s colonization of the Americas. Through this process, they were articulated, individually and together, for the first time, to capital and its growing world market. In Quijano’s words:

All of these forms of labor were historically and sociologically new: in the first place, because they were deliberately established and organized to produce commodities for the world market; in the second place, because they did not merely exist simultaneously in the same space/time, but each of them was also articulated to capital and its market. Thus they configured a new global model of labor control, and in turn a fundamental element of a new model of power to which they were historically and structurally dependent. (Quijano 2000: 3)

The global model of power, then, is characterized by both capitalism and coloniality, whereby ethnicity or/and race—social constructions and ever-malleable—emerged as a “building block,” delineating social boundaries connected to the division of labor (Quijano and Wallerstein 1992: 551). Justifying multiple forms of labor control in relation to ethnicity—first in the Americas, and then in similar and different forms elsewhere—for the inter-related purposes of production, world trade, and capitalist accumulation, Black Africans were constructed as slaves, Native Americans as various forms of coerced cash-crop labor (for example, *repartimiento*, *mita*, peonage), and Europeans as wage labor. Coloniality is simultaneously a defining feature of the “inter-state system” whereby states and emerging states became linked through a hierarchy in which the lower rungs consisted of formal colonies, and higher rungs as colonizing states. As formal colonization ended and states became politically independent, coloniality persisted in the inter-state system as a socio-cultural hierarchy of European and non-European states (Quijano and Wallerstein 1992).

My 2012 research monograph, *Rethinking Unequal Exchange—The Global Integration of Nursing Labour Markets*, specifically the treatment of the labor export policy architecture of the Philippines, is an application of Quijano’s notion of coloniality and Amin’s notion of transfer within the financial expansion of Arrighi’s fourth systemic cycle of accumulation. In some detail, in the early 1970s, the Philippines elite transformed the employment of Filipino citizens into a means of collecting foreign exchange. Labor legislation was revamped to allow for various arms of the state to market and train workers of the Philippines for employment in labor markets outside of the Philippines. Through the 1974 Labour Code (PD442), Filipino and Filipina temporary migrant workers were and continue to be required to remit to the Philippines more than half of salaries earned abroad. Prior to leaving the Philippines, workers are obliged to apply for “deposit accounts” set up for the purpose of receiving salaries in international currencies (Foz 2000). The net result of this shift is that worker remittances became the Philippines’ second largest source of

foreign exchange from 1990, far outdoing traditional exports including mineral products, coconut products and other agro-based products in absolute terms as well as by rate of growth (Valiani 2012).

In order to understand why and how the Philippines state moved to an architecture of labor export, I draw on Samir Amin's transdisciplinary approach. In brief, I demonstrate historically how though being one of the first states in Asia to achieve political independence and embark on the development of a domestically-focused, industrializing economy, the just over one decade-long process was not successful—in capitalist development terms—due to somewhat modified but persistent relations of primitive accumulation. Progressive politics, including economic policy, were reversed by a combination of internal and external forces, and the balance of payments crises of the first (Spanish) and second (USAmerican) colonial periods reproduced themselves by the second half of the 1960s. This led to massive foreign exchange borrowing on international markets by the Philippines state and the beginning of a debt-austerity spiral that continues to this day (Valiani 2012).

Some fifty years earlier, Samir Amin had produced similar analyses of Mali, Guinea, and Ghana in his 1965 volume, *Trois expériences africaines de développement: le Mali, la Guinée et le Ghana*. Shortly after, Amin (1971) analyzed the historical structures already resurfacing in the form of balance of payment problems in Sénegal, Ivory Coast and Ghana, *in l'Afrique de l'ouest bloquée*, translated into English as *Neo-Colonialism in West Africa* (Amin 1973b).

As the growth of worker remittance based foreign exchange in the Philippines caught the attention of international financial institutions and intergovernmental bodies, mainstream economists within these bodies and elsewhere began propounding a theory equating labor migration and remittances with development. By the early twenty-first century, this would become the newest policy prescription for all countries facing foreign exchange shortages; from Asia, Africa, and Latin America, to formerly communist states of Europe. Lacking historical methodology, and more importantly, a political orientation of liberation, these thinkers and players justify and facilitate the gathering of what I argue is the most “politically malleable” form of foreign exchange: worker remittances—leaving the debt spiral phenomenon virtually unquestioned (Valiani 2012: 102). Linking financialization, debt and austerity, Samir Amin wittingly points out:

The breathtaking growth in financial investments requires—and sustains—among other things, the growth in debt, in all its forms, particularly sovereign debt. When existing governments claim to pursue the goal of “debt reduction,” they deliberately lie. The strategy of financialized monopolies needs growth in the debt (which they seek and do not oppose)—a financially attractive means to absorb the surplus from monopoly rents. Austerity policies imposed to “reduce the debt,” as it is said, actually end up increasing its volume, which is the sought-after consequence. (Amin 2019: 33)

Along with others, this insight in what would be one of Samir Amin's last writings is a political and ideological challenge to current African, Latin American, and Asian elites, including a large portion of the intelligentsia.

To demonstrate a facet of what I termed in the introduction, "Amin as strategist," I end this section with a vision for socioeconomic development offered by Amin in 2016. Differing from many world-systemists, Amin recognized, through to his last days, that socioeconomic development in response to the needs of the majority remains elemental to liberation in Africa, Latin America, and Asia, and hence, a principal *problématique* for intellectuals. Amin (2016) therefore specifies a vision for countries with rural populations exceeding 30 percent. Among others, the vision poses a sharp challenge to elite visions in these regions, for instance, the African Union's *Africa Mining Vision*. Inspired by the global movement, *Via Campesina*; Amin, in a Facebook post, paints a picture of state-led industrialization driven by the revival of peasant agriculture, to the end of *food sovereignty*. In more explicit terms, this involves implementation of a set of consistent national policies aiming at "walking on two legs," (1) constructing an integrated autocentered industrial productive system; (2) moving into policies of revival and modernization of a peasant agriculture; and (3) articulating the two goals into a consistent comprehensive plan of action (Amin 2016).

Amin identifies "state intervention" as a key vehicle for this project, but Amin's reach for twenty-first century state intervention is far broader than that of previous periods. He therefore includes not only state planning, but also managing an independent national financial system as well as systems of taxation. The latter would finance the construction of industries while the former would steer the entire process to avoid inflation and the growth of large foreign debt. In terms of foreign direct investment, Amin (2016) stresses that this should be "negotiated under conditions that reinforce the national project rather than annihilate it." Framing all of this, unlike previous postcolonial experiences of state led development, is the goal of national food sovereignty.

The implication for land policy is that land is not to be considered as "merchandise," but rather as a common national good at the disposal of the whole peasantry. This implies ownership patterns which protect access to land for all members of all peasant families, on as equal footing as possible. Making the link back to industrialization, Amin (2016) defines the modernization of peasant agriculture whereby a number of priority industries should be conceived, collectively and as per national context, in order to assure the provision of inputs and consumption goods required in the agricultural sector.

This vision is premised on Amin's corrective to a notion of industrialization still idealized in many parts of Africa, Asia, and Latin America. In the foreword to my monograph, Amin underlines that mass migration to the Americas, Australia, New Zealand, and South Africa was the outlet for the absorption of Europe's "surplus rural population" from the sixteenth century onward. Contrary to the conscious or not-so-conscious assumptions of those modelling industrialization in the Majority World on that of Europe, which began some three centuries earlier, far from all peasants displaced in European processes were absorbed in emerging urban industrial centers of Europe. There were limits to this absorption. With the conquering of Indigenous peoples of "the New

World,” masses of displaced Europeans were able to migrate or/and be resettled such that between 1500 and 1900, the proportion of world population represented by Europeans doubled, from 18 percent to 36 percent (Amin 2012). As Amin underscores, without this outlet, “the cities of Europe would have been overpopulated by the ‘unemployed’, taking on the characteristics of the ‘planet of slums’ that is the reality of cities in the global South today” (Amin 2012: xiii).

Conclusion

The collective work on world historical capitalism by Samir Amin and his interlocutors offers tools that are foundational to decolonizing and the much larger objective of liberation. I argue that Samir Amin’s thought laid the bedrock for what would come to be known as world-systems analysis, which is most widely associated with Immanuel Wallerstein, Giovanni Arrighi, and others of the global North. As a student of all of these interlocuteurs, I have featured what I consider to be the most salient of their discussions—discussions which I believe too few are exposed to in the current intellectual moment of insipid theory and microscopic historiography.

I have highlighted the concepts of accumulation on a world scale, the capitalist world-system, conjonctures and the *longue durée*, systemic cycles of accumulation, European hegemony, and epistemologies of the South—all vital to escaping the eurocentrism that continues to pervade intellectual thought. I have presented some of Amin’s most basic categories—modes of production, classes, forms of surplus, transfer, centralization, and articulation—arguing these are key to the balance of structural analysis and historical specificity in Amin’s methodology. They are also key to reconstructing the economic histories needed to build the general theory of capitalist formations that Amin saw as necessary. I have also compared and contrasted these concepts and categories with those of eurocentric Marxist stage theory, or what Amin called, Marxology.

In the last section I offer an application of the theoretical categories of Amin and Quijano to labor export and state collection of remittance-based foreign exchange, a phenomenon of the financial expansion in Arrighi’s fourth systemic cycle of accumulation. Finally, I showcase Amin’s commitment, through to the end of his life, to the *problématique* of socioeconomic development in Africa, Latin America and Asia—which includes his ability to integrate notions born in peoples’ movements like Via Campesina. I demonstrate how such analysis is both rigorous and political—means and end open to all intellectuals concerned with human liberation.

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