



Immanuel Wallerstein and the Genesis of World-Systems Analysis

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Even radical innovations are shaped by historical paths and contexts. They depart from some features, reproduce others, and show the marks of their origins. It takes nothing away from the achievements of remarkable creators, save perhaps individualistic illusions, to note that they are made possible by preparation, pathways, and contributions from many sources.

World-systems analysis is no exception. One of the most original and important social science projects of the late twentieth century, it was produced by many scholars working and debating together across disciplinary and national lines. Yet Immanuel Wallerstein was crucial. His intellectual innovation, clarity, and dogged pursuit of core themes were all remarkable. So were



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his gifts for networking, collaboration, and institution-building. He was not without pride in this but wary of individualistic illusions. Moreover, world-systems analysis was shaped not only by its protagonists but also by the era of postcolonial independence, the Cold War, and rapid growth of academic social science. Nonetheless, history is made in the intersection of biography and larger social forces. Wallerstein's story is a central and illuminating part of the larger intellectual achievement.

This article cannot tell the whole of that story or offer an adequate analysis of the interplay of all intellectual debates or their contexts. But within the compass of its biographical focus, I will try to trace the significance of Wallerstein and his particular trajectory. It is offered both in homage to an extraordinary man and as a contribution to the sociological history of social science.

Intellectual and Political Roots

Immanuel Wallerstein was born in 1930 into a politically conscious family of Polish Jewish immigrants. But this states it too baldly, and without appropriate respect for the ambiguities of national labels in the modern world-system. Wallerstein's parents were from Galicia—in the late nineteenth century, home to most of the Jews of the Austro-Hungarian Empire and origin of many key intellectuals of the diaspora including Martin Buber, Isaac Deutscher, and the brilliant filmmaker (and critic of McCarthyism) Billy Wilder. He was also born into the rich diversity and intellectual debates of New York City and into the crises of the mid-twentieth century.

From his youth, Wallerstein was active in and shaped by the internationalist Left. He was not a joiner of parties, but he was a participant in conferences and a key figure in networks of debate.¹ Anchored in the Anglophone West by *Monthly Review*, *New Left Review*, and their linked publishing houses, and joined by numerous other publications and conference gatherings, this debating Left complemented and enlivened more purely academic research and discourses. The journals had their own orthodoxies and blinders, and they were not immune to ethnocentrism—or Eurocentrism. Nonetheless, they offered bridges into the intellectual and political conversations of a wider world. Wallerstein was a frequent—and influential—traveler across those bridges. Connecting to intellectually lively political debates in Africa, Asia, Latin America, and Europe also meant taking up issues of fundamental importance that were ignored or back-burnered by mainstream American academic social science.

¹ Not being a joiner of parties, he was not a participant in sectarian splits. This is a generational as well as personal matter. Those who became young adults in the inter-war era often moved in a hothouse of ever-shifting partisan alliances—like the various Trotskyite parties and then the Johnson-Forest Tendency that joined C.L.R. James, Raya Dunayevskaya, Grace Lee Boggs, and later Max Schachtman—until they split. The point is not just about factionalism. It is also that Wallerstein came of age in a postwar generation which was more able to make careers in the expanding university system (which coincided with receding immediacy of revolutionary prospects).

Wallerstein (2006b) entered Columbia College in 1947, when, as he later recalled, “all seemed possible” (Wallerstein 2006b: xvi). It’s not just that he was young.² The world war(s) had been won. The United Nations had just been founded. The memory of depression was receding. Welfare states were being built. Universities were expanding, both in numbers of students and faculty and range of programs. Knowledge creation was full of optimism. The time seemed ripe for renewed pursuit of social transformation, grounded in both knowledge and activism. Social science was growing rapidly and organized to provide guidance to the projects of social reform, institution-building, and organized capitalism.

But the Cold War took hold. During Wallerstein’s undergraduate years, Communist governments were established throughout Eastern Europe and anti-communism hardened in the West. Berlin was blockaded, NATO was formed, and the Marshall Plan launched. Just as Wallerstein graduated, the Korean War induced a draft. Wallerstein served two years in the U.S. Army. Even while still in the army, he participated energetically in international youth congresses. Such conferences, mass assemblies, festivals, and forums were a field of Cold War contestation with competing organizational sponsors and anxieties about communist infiltration and CIA funding and manipulation. Wallerstein was drawn to calls for global federalism, though he also argued that federalists needed to recognize movements for national independence (and indeed, he continued to think that nationalism had a legitimate place in politics, though also important limits). He became Vice-President of the World Assembly of Youth which enabled him to attend its 1952 meeting in Dakar, Senegal. Anti-colonial independence movements were sweeping Africa. These not only informed his thinking but also gave him connections that would be valuable as he took up research in Africa.

Wallerstein reports being convinced from early on that the Cold War was not the major confrontation of the era. “The most important thing happening in the twentieth century was the struggle to overcome the control by the West of the rest of the world” (Wallerstein 2000b: xvii). He followed the Non-Aligned Movement, the Bandung Conference of 1955, and Indian independence—the biggest of all the independence stories (Wallerstein 2000a, 2002). These cast in a different light the Marxist focus on class struggle. Expropriation, exploitation, and domination did not come in only one form centered on relations of production inside countries. Trade, imperialism, race, and nation-states were integral to how capitalism worked.

At the same time, Wallerstein was shaped by and an active participant in the great postwar flourishing of academic social science. Columbia was a leading institution, elite but encouraged by its New York location to be more open than others to the world—and to Jewish immigrant

² As importantly, Wallerstein was young at an auspicious time for launching an expansive, influential academic career. Anyone just a little older confronted the Depression, World War II, and a very tight job-market immediately after the war. Leftists just a little older endured years of bitter sectarian conflicts and splits. Jewish students just a few years older confronted active discrimination; bigotry was worse at Princeton and Yale, but Columbia cut Jewish admissions from 40 percent to 22 percent in two years shortly after World War I—partly by regional quotas that also worked against New York City applicants, and channeled Jewish students into its Seth Low Junior College in Brooklyn until World War II. There were challenges for Wallerstein’s generation, but from the later 1950s both inclusion and overall growth created opportunities in academia.

students. Wallerstein earned all his degrees there and rose to be a professor while it was at the center of American sociology. As an institution, Columbia was hardly left-wing. Many of its leading faculty were anxious to balance desires for social change with respectability. This created tensions, not least between the dominant sociologists and Wallerstein's undergraduate teacher, C. Wright Mills. Confrontations in 1968 would harden divisions. But in the 1950s and early 1960s, co-existence was not just possible but often intellectually productive. Much of Wallerstein's intellectual perspective was formed in this context. Throughout his life, he remained committed to universities, sociology, and interdisciplinary social science.

Returning to Columbia in 1953 for graduate study, Wallerstein paused for research on McCarthyism before continuing his mainly international pursuits. This distinctively American anti-communist panic had started in 1950 but reached fever pitch in 1954. Among social scientists as well as wider publics, this brought a phase of intense accusations and a more enduring reluctance to engage directly in politics. Wallerstein's (1954) master's thesis took this up almost in real time. He drew on C. Wright Mills' ([1948] 2001) distinction between practical, highly contextual and anti-intellectual right-wing politics—such as McCarthyism—and the older tradition of “sophisticated conservatism.” This prefigured Wallerstein's (2011) later stress on the role of “enlightened” conservatives such as Bismarck and Disraeli in stabilizing the modern world-system in an era of centrist liberalism. And of course, it is not without relevance today, when enlightened conservatives seem in very short supply and both the world-system and U.S. politics increasingly destabilized.

Wallerstein stayed at Columbia to pursue a PhD. He found himself in one of America's leading sociology programs, perhaps the most influential during his era, but also one fraught with internal divisions reflecting competing epistemological views and larger politics of knowledge as well as an intense local competition for relative standing. The graduate department was dominated by Robert Merton and Paul Lazarsfeld. They led Columbia in defining postwar sociology's standard approach to integrating mostly quantitative empirical research and theory. This differed from the previously hegemonic, more often qualitative Chicago School and Harvard's more theory-driven style. A basic commitment was to building theory incrementally, non-holistically, and close to research. Merton and Lazarsfeld were individually brilliant sociologists and as a team hugely influential in institution-building—pioneering the use of external contracts and grants to fund research and employ students. They attracted a remarkable collection of graduate students and other outstanding faculty—who found the environment both extremely stimulating and very competitive and hierarchical (Coleman 1990).³ Merton and Lazarsfeld were social democrats who wanted sociology to contribute to progress. They thought the best approach was to advance sociology as a normal science with empirically tested propositions and ever more effective explanations. They steered clear of explicit political commitments both out of principled commitment to objectivity and as a way to advance the respectability of sociology—still

³ Coleman (1990:102) also includes brief mention of S.M. Lipset's “bright, energetic, and self-confident” new graduate assistant, Immanuel Wallerstein.

considered a new discipline—and to secure the autonomy of the university in the wake of McCarthyism.⁴

As Wallerstein was finishing his PhD, his undergraduate teacher C. Wright Mills skewered these disciplinary ambitions in *The Sociological Imagination* (1959). He dismissed Lazarsfeld's pursuit of methodological precision and accumulation of tested findings as "abstracted empiricism." He was equally hard on what he called "grand theory," notably as pursued by Talcott Parsons. Not only did these contrasting approaches fail to connect with each other, they were both at odds with connecting personal experience to wider societal conditions. Mills called for sociologists to explore the major issues that shape their societies and their individual lives, to connect these to historical transformations, and to address basic issues like inequality and injustice. By contrast, abstracted empiricism and grand theory seemed to defer such attention to what mattered most to a future after the construction of a new scientific apparatus was completed (which Mills thought was never going to happen).⁵

Wallerstein embraced Mills' goal of a sociology that tried to make sense both of major social issues and historical transformations. But Mills was not available to be Wallerstein's PhD advisor. He was appointed only to teach undergraduates in Columbia College (claiming to prefer teaching undergraduates because they were more likely to become leaders than academics). Mills both kept his distance from and was marginalized by the graduate department.

Wallerstein began increasingly to think of himself as a political sociologist and worked as a research assistant to an emerging Columbia star, Seymour Martin Lipset, the leader in developing political sociology as a new and interdisciplinary field. There were old roots, of course, including Max Weber, but in the United States, sociology had generally avoided politics (though there was lots of engagement with "social problems"). The rise of political sociology helped Wallerstein assert the clearly political character of social change in relation to both apolitical sociology and the subordination of the political by economic Marxisms. Lipset focused distinctively on the state and on questions of democracy in major institutions like unions. He was a socialist—fresh from studying the attempt to implement socialism in a Canadian province (Lipset [1950] 2021).⁶ But he was also an enthusiast for American exceptionalism—which Wallerstein would eventually see as no more than a reflection of transient U.S. hegemony in the world-system.

Much political sociology focused on issues within nation-states, like voting, attitudes, and political participation, and broadly took the structural framework as a given. Lipset was among the

⁴ The phrase "value-free social science," drawn from Max Weber, was a mantra in mainstream sociological circles of the day. Merton ([1942] 1973) clarified that science was not free of values or norms but embraced disinterestedness as one of its norms.

⁵ Partly because it was in New York, Columbia was a center for work that did not conform to the dominant Columbia model of what sociology should be. Daniel Bell, who overlapped Wallerstein's years there and influenced him, made an influential career exploring key issues and transformations directly rather than seeking first to build either empiricist or theoretical apparatuses (Starr and Zelizer 2022).

⁶ Like Daniel Bell ([1976] 1978), Lipset was on a trajectory towards what some labelled "neoconservatism"—though the attribution is misleading. Bell declared himself "a socialist in economics, a liberal in politics, and a conservative in culture" (Bell [1976] 1978: xi).

leaders in advancing state-level comparison, along with students-becoming-colleagues like Stein Rokkan and Juan Linz—a Wallerstein contemporary at Columbia. Linz was among the founders of the influential SSRC Committee on Comparative Politics in 1957 (with Gabriel Almond, Lucien Pye, and others) and in 1960 Linz and Rokkan were co-founders (with Shmuel Eisenstadt and Morris Janowitz) of the Committee on Political Sociology of the International Sociological Association. These became central to development and diffusion of the “modernization” paradigm and comparative studies of political “development.” Wallerstein would both conduct explicitly comparative research and write on comparative methods, but he also increasingly saw problems with comparisons across nation-states that did not address the histories or interdependences of those nation-states.⁷ Likewise, from early on, Wallerstein was skeptical of modernization and developmentalism with their suggestions of unilinear pathways, over-valuation of Euro-America, and underestimation of conflict.

Lipset left for Berkeley in 1956 while Wallerstein was doing the research for his PhD thesis. To finish his degree, Wallerstein drew on advice and support from two then-important but now nearly-forgotten figures. Hans Zetterberg would go on to be a leading analyst of the Swedish welfare state and an important figure in establishing sociology in Sweden. At the time, he was known in the United States as a public opinion researcher and advocate for data-driven social science and formal theory and verification (Zetterberg [1954] 1965). This prefigured Wallerstein’s later interest in the logics and methods of social inquiry, minimally evident in the initial formulation of world-systems analysis but an increasing preoccupation from the 1970s on. Robert S. Lynd (1930, 1937) had been a pioneer in the use of social surveys and co-authored the Middletown studies of place-based community with his wife Helen in the context of an increasingly complex industrial society.⁸ These made Lynd one of the most famous of all American sociologists—referred to in the 1930s as “Mr. Sociology” (Velásquez 2022: 353). More than most sociologists, he like Mills also explicitly studied power relations. In 1939, Lynd had published *Knowledge for What?* an inquiry into the purposes and uses to which social science was put in American society—often support for the existing power structure. Lynd offered a (fairly gentle) critique of social contradictions. Aligned with the center-Left, he was investigated during the Red Scares for possible Communist involvement.⁹ Lynd’s was a fading star by Wallerstein’s day. Yet, his public engagement anticipated Wallerstein’s. In 1998, as President of the International Sociological Association, Wallerstein (1998) would place Lynd’s book alongside Weber’s famous

⁷ Wallerstein’s dissertation was a cross-national comparison of Ghana and the Ivory Coast but did not treat them as cases independent of each other, and insisted they were part of “a changing world order to which developments in West Africa themselves contributed” (Wallerstein 1959: xiv; Hopkins and Wallerstein 1967).

⁸ Both praised and influential, the Lynds’ studies were later criticized for focusing on the 92 percent of Middletown (Muncie, Indiana) that was white and neglecting the issue of race.

⁹ Sadly, the Lynds’ son, Staughton C. Lynd, was more directly a victim of the enforced centrism and pseudo-neutrality of American academia. After being denied tenure at Yale, he became a lawyer working for unions and against the deindustrialization of the American Midwest attendant on “globalization” (a term Wallerstein would always resist partly because it reproduced the pseudo-neutrality and hid power dynamics).

call for value-free knowledge to suggest both the legitimacy of clear political commitments, the impossibility of complete neutrality, and yet the necessity of a commitment to truth that could override immediate political battles.

In his denunciation of abstracted empiricism and grand theory, Mills didn't comment on the influential alternative proposed by Robert Merton and pursued by many connected to Columbia Sociology. Merton advocated "middle range theory" ([1949] 1968). By this he meant going beyond mere assemblages of tested empirical propositions while holding back from over-ambitious general theory.¹⁰ His program was to develop causal explanations that could be transposed from one empirical domain to another—like theories of reference groups or of crime caused by strain between values and opportunities.¹¹ The project drew on an implicit scientific ideal of taking complex apparent wholes apart to identify causal mechanisms at more "micro" levels, testing these by replication across contexts, and then working to integrate them. The goal was incremental advances in cumulative knowledge, but these would necessarily be abstract and independent of context.

Wallerstein recognized achievements in this (and other) approaches to conventional social science. He appreciated rigor and clarity. And he was willing to be explicit about what he considered explanatory mechanisms and even try to identify law-like regularities (though not presume the laws were transhistorical). But from early in his career, Wallerstein had doubts about the pursuit of generalization by abstraction, identification of allegedly independent variables, and testing causal explanations across cases. Among other things, this meant deferring attention to many of the biggest and most important things actually shaping the world in order to wait for the greater perfection of nomothetic science. He also doubted this would come.

Too much of the sociological mainstream accepted, even celebrated, the terms of Germany's (and Austria's) turn of the century *methodenstreit*. The opposition between studying historical individuals and seeking generalizations from multiple cases was embraced early and strongly in American social science and mobilized to divide not only history from science but also interpretative ethnography from quantitative methods. "Idiographic" became a term of exclusion from science. The "nomothetic" ideal was pursued through statistics though mere probabilities typically fell short of the "covering law" explanations sought by Carl Hempel (1948) and other logical empiricists.¹² Meanwhile, "macrohistory" was left out.

¹⁰ Merton is often, but misleadingly, seen as a functionalist. He found much to admire in the "structural-functionalism" of Radcliffe-Brown and Malinowski, but he was a critic of the idea that social organization in general could be explained by functions or functional pre-requisites. He codified functionalism in 1948 (before Parsons major turn in that direction) but did so in order to criticize over-generalizing it. He thought modern, urban-industrial societies were too complex. At the very least, there would always be dysfunctions undermining integration. He preferred to focus on particular packages of causes and consequences (Merton [1949] 1968; Huaco 1986).

¹¹ Later "analytic sociology" would reconfigure middle range theory in terms of causal mechanisms (Hedstrom and Udehn 2011).

¹² The philosophical debates active in the postwar era became contentious in the 1960s and 70s, then faded from mainstream sociology. Nonetheless, the older views exerted a durable influence on social science textbooks and

Wallerstein was at odds with middle-range theory and more generally the incremental pursuit of general knowledge championed at Columbia for four key reasons: First, focusing too much on analytic abstraction pulled sociologists away from studying many of the most important questions and problems in the world—say, the end of colonialism—deferring them indefinitely to pursue a scientific ideal that might never be achieved. Second, micro-foundationalism biased analyses against large-scale phenomena—the structural organization of society as such rather than just processes in society. Third, equating explanatory rigor with replication and generalization encouraged ignoring rare (small-N) phenomena no matter how important they were—like revolutions, historical capitalism, or the modern world-system. Fourth, this approach to cumulative knowledge as aggregated generalizations marginalized or at least undercut thinking in systemic terms, with attention to sharp differences and disruptive historical changes among them.¹³

From a middle-range point of view, analysis of the world-system looked either like premature generalizations of grand theory or historical analysis of something that happened only once and therefore could not be studied scientifically. Increasingly, Wallerstein argued it was crucial to integrate history and social science, places and relations among places, inequality and struggles for justice. “World-systems analysis” sought to do this, not as “a theory but [as] a protest against neglected issues and deceptive epistemologies” (Wallerstein 2000b: xxii).

Situating politics in a world-systems context was more than a matter of shaking off the inheritance of conventional views. It required developing a new perspective to replace the older one. Wallerstein’s (2000b) objections became increasingly sharp and theoretically informed. But even in his early work he made the case for real history rather than assessment of quasi-evolutionary “progress.” As he summed up in 1976, “it is the past, rather than some evolutionary dynamics, which has shaped the present” (Gutkind and Wallerstein 1976). Wallerstein (1961) noted that the national unit of analysis was often the product of both (a.) colonial imposition of power which “treated as one unit what had previously not been one” (Wallerstein 1961: 35) and (b.) independence movements that embraced this complicated inheritance for the sake not just of autonomy but participation in larger world structures and processes.

These were central themes for another of Wallerstein’s important Columbia influences. Karl Polanyi would eventually be celebrated as a progenitor of economic sociology and historical political economy, but at the time he was a respected yet marginalized figure in the Columbia orbit. Appointed in economics, he fit the dominant disciplinary trend poorly. Polanyi’s account of *The Great Transformation* (1944) insisted on the centrality of dispossession and disruption to capitalism, from enclosures through the destruction of craft work. State action, in alliance with

teaching and implicit normative (or anti-normative) orientations. Wallerstein returned to aspects of them in his late-career embrace of complexity theory (2004a) and attempt to “open” social science (1996).

¹³ In the introduction to his first book, Wallerstein (1961) warns his readers that he is refusing the false dichotomy of much social science ideology: The purpose of his study “is twofold—to indicate what is going on in Africa, and to analyze some more general social processes” (Wallerstein 1961: 5). Wallerstein recurrently raised these concerns, notably in his arguments for reorganizing social science and in briefer comments accompanying his formulations of world-systems analysis (see, for example, [1991] 2001: 229–236).

liberal ideology, was complicitous in both expropriation and the creation of new class relations (Polanyi 1944). More generally, he argued, marketization did not just happen; markets were politically instituted, historically and institutionally specific, not nomothetically universal (Polanyi [1957] 1968). Often working with anthropologists, Polanyi sought to deuniversalize the liberal market model through research into the slave trade, exchange in minimally technological societies, other socio-economic formations. His heterodox accounts of economic history showed limits to both standard market-fundamentalist economists and versions of Marxism that treated money, markets, and even empire as epiphenomenal to relations of production. Polanyi had further influence on the development of world-systems analysis through his student Terence K. Hopkins, who became one of Wallerstein's closest colleagues in the development of world-system analysis, a lifelong friend, and when the time came, the pioneer in relocation to Binghamton (Wallerstein and Tamdgidi 2017).¹⁴

Of course, as a graduate student Wallerstein had not yet conceptualized the world-system; nonetheless, his core interests were political, international, and focused on large-scale change. Like many others, he was determined to study pressing problems of the “real-world,” not simply to pursue cumulative knowledge by abstraction. He was also one of many young social scientists frustrated by what would later be termed Eurocentrism and eager to study other regions and civilizations.¹⁵ Very little was more pressing than struggles against colonialism and the pursuit of viable futures by newly independent countries individually and in webs of relationships. This was a theme he could pursue in the contexts of area studies and comparative politics.

In the 1950s and early 1960s, there was relatively peaceful co-existence and often proclaimed complementarity between disciplinary social science and interdisciplinary area studies. Columbia was a center for both. Wallerstein focused on Africa but was also interested in work from all the area studies fields. The regional fields provided a context for challenging some of the specious generalizations of both mainstream Euro-American social science and dominant strains of Marxism. The approach had older roots but flourished in the United States, especially during and after World War II, partly on the basis of government and foundation support which was often motivated by national security concerns. Through organizations like the SSRC (of which Wallerstein would become a board member) and some universities' international centers, the study of different areas was brought in an attempt at “complete world coverage” to inform both comparative research and an integrated view of the world (Calhoun 2010; Niu 2019). This was, as Wallerstein and others would argue, a view from the perspective of a hegemonic power. But area studies fields were also in critical tension with that neo-imperial view. Nurturing multi-dimensional and interdisciplinary understanding of different regions of the world, they sought to grasp specific countries (and other organizational structures) in their regional contexts and longer

¹⁴ Wallerstein dedicated the first volume of *The Modern World-System* ([1976] 2011) to “TKH.”

¹⁵ The term “Eurocentrism” was coined by Wallerstein's frequent collaborator, Samir Amin, in the 1970s. Far from simply labelling a cultural bias, Amin offered a critique of “culturalism” and pointed to the importance of material conditions—and contradictions—shaping both patterns of dominance and resistance (Amin [1989] 2009; Wallerstein 1997).

histories rather than only in structures of Cold War alliances or market relations. Initially organized mainly to train American specialists on foreign places, they grew into networks of colleagues in the United States and abroad, though seldom without asymmetries. From outside, disciplinary social scientists often viewed them as insufficiently theoretical: “ideographic” rather than “nomothetic” in the terms of binary opposition Wallerstein deplored throughout his career.

Africa

The development of world-systems analysis is inconceivable without African Studies. For Wallerstein and many others, this was never “just” academic and certainly not just a matter of outside expertise *on* Africa. It was also, crucially, a project of intellectual and political engagements with African colleagues and struggles on the African continent. Wallerstein credited Africa with challenging the more stultifying parts of his previous academic training. Part of that training included the prioritization of problems within social science disciplines over problems in the world. This was among the aspects of social science he would try to “unthink” (Wallerstein [1991] 2001, 1996, 2004b).

During the late 1950s and early 1960s, Wallerstein (1959, 1964) conducted sustained research in Ghana and Côte d’Ivoire for his PhD thesis and subsequent book on the role of voluntary associations in nationalist movements. But this was just a portion of his real topic (or knowledge-forming interest): the politics of independence (Wallerstein 1961). Wallerstein’s engagements with Africa helped him break with the problematic assumptions of Eurocentric, ahistorical, and decontextualized social science—perhaps most notably the notion that nation-states were the crucial unit of analysis. He never approached independence movements as completely discrete “cases,” but always as interconnected in a movement for African unity.

Wallerstein’s studies of Africa were never simply local tests of general theories. They always started with observation of historical patterns, actual social processes, and events. But they were not simply inductive either. Wallerstein asked questions shaped by practical challenges and struggles, attentive to the way actors in those struggles understood them, but not always accepting those self-descriptions for purposes of analysis.¹⁶ What did it take to win independence? What did it take to hold a newly independent state (or any other) together? What were the limits of action for leaders of newly independent states? What were the reasons to want African unity and what obstacles stood in the way? In *Africa: the Politics of Unity* (1967), for example, Wallerstein started with the anomaly that unity was a clearly stated priority for African leaders and yet not taken seriously by non-Africans; it traced something of the history of Pan-Africanism and the state of play in the 1960s; and it examined how the world context limited and sometimes directly

¹⁶ Of course, Wallerstein did bring questions and concerns from Western social science—like the effort at comparative analysis of voluntary associations in his dissertation book. And it is noteworthy that the two epigraphs to *Africa: The Politics of Unity* (Wallerstein 1967) come not from pan-African leaders but from Georges Sorel and Joseph Schumpeter. The poignant words from the latter are almost Wallersteinian in tone: “To achieve the possible is not failure but success, however inadequate the success may prove in the end.”

undermined African pursuit of unity.¹⁷ The wider world included both the Western dominated world-system and the communist world-system and the Cold War between them. It was a source and object of pan-African insight and struggle as well as an obstacle. “The field of action of the movement toward African unity was not Africa but the world, for its objectives were not simply to transform Africa, but to transform Africa by transforming the world” (Wallerstein 1967: 237).

The African diaspora and especially the Caribbean were influential mediators in this engagement between and Africa and the world. This pointed to the way in which the modern world was structured by the conquests, trade, and plantations at its beginning as well as the continuing connections among peoples of African descent. Different colonial empires and metropolises also exerted enduring influences. It was thus in Paris that Senegal’s Leopold Senghor, Leon Damas of Guiana and Aimé Césaire from Martinique formulated the term *négritude* to point to the resources offered by African history and culture, to the importance of Black solidarity, and to the African diaspora. A positive representation of Blackness to counter the racist denigration implicit in European thought, it was also a reminder of the racial color line Du Bois had famously argued was transnational and could be overcome only through global transformation.¹⁸

From Marcus Garvey (born in Jamaica and active in the United States) to Trinidad’s George Padmore and C.L.R. James, comparably impressive anglophone Caribbean intellectuals and activists followed partially similar paths. Pan-African struggle forged connections across historical and linguistic distinctions. Caribbean leaders and exemplars became influential in Africa and on a global scale. The Haitian Revolution was as symbolically powerful in Africa as Ethiopian resistance to fascism was throughout the diaspora. The two are joined in the figure of C.L.R. James, whose *Black Jacobins* ([1938] 2023) dramatized the Haitian story and who founded the International African Friends of Abyssinia.¹⁹ Stokely Carmichael (Kwame Ture), originally hailed from Trinidad, made clear that connections among Pan-Africanism, Fanon, and Black radicalism extended to the United States.

Like pan-African thought more generally, *négritude* could boost not only an African sense of agency but also recognition that African struggles needed to be understood in ways that transcended empires and post-colonial networks, regions, languages, and nation-states. Still, *négritude* (and analogous anglophone celebrations of Blackness) could too easily be deployed as a simple reversal of the racist essentialism of colonial Europe. As Fanon ([1961] 1963) argued,

¹⁷ It is, by the way, in the last chapter of Wallerstein’s 1967 book that he first begins to write of the “world system,” not yet hyphenated or fully theorized.

¹⁸ Du Bois figured widely in Wallerstein’s early work, including both *Africa: The Politics of Independence* (1961) and *Africa: The Politics of Unity* (1967). Even as other American sociologists has recognized Du Bois’ importance, too many have viewed his project in purely national, domestic terms. This betrays Du Bois’ Pan-Africanism—as Stalin’s proposal to build “socialism in one country” betrayed the international working-class movement.

¹⁹ See also *C.L.R. James: The Artist as Revolutionary* (Buhle [1988] 2017) and *C.L.R. James’s Caribbean* (Henry and Buhle 1992). Ethiopia held special significance among Black intellectuals as an impressive ancient civilization, iconically African and Christian, never colonized by Europeans, and successful against Mussolini in the Battle of Adwa. At the same time, of course, it was an exploitative empire long tolerant of slavery and still resistant to land reform. James was clearheaded about Ethiopia’s limits but argued that fascism would be worse.

race matters because colonialism has made it matter, not because it is a permanent feature of reality. It cannot be ignored while it still structures oppression, resistance and indeed too much of life, but it should not be considered permanent or essential.²⁰

Instead of an essentialist identity, Wallerstein (2006a) held that *négritude* should be understood as a path towards a “new synthesis.” This synthesis would point to what Césaire saw as a “truly universal universalism” (Diagne 2018). This did not mean a Fichtean dialectical triad in which European colonization would meet African (or other postcolonial) identities which would in turn give way to a global identity. Rather, Wallerstein (2006a) invoked Senghor’s call for “the world to come to the *rendez-vous du donner et du recevoir*, the meeting place of giving and receiving” (Wallerstein 2006a: 79). This demanded giving and receiving in multiple directions, without the domination of any. The new unity could not be achieved merely through a celebration of particularity, even in radical revolutionary form. It demanded a reconstruction of the world.

Many pan-African radicals were drawn to communism, then frustrated by the way communist parties treated the Black struggles around the world as lacking in autonomous revolutionary capacity. As Wallerstein (2006b) noted, “Aimé Césaire’s *Discourse on Colonialism* remains the classic expression of why intellectuals of the colonial world (and of course not they alone) withdrew their commitment to Communist parties and asserted a revised version of the class struggle.”²¹ James ([1938] 1995) argued that the defense of Ethiopia was part of a necessary transnational struggle in which the whole pan-African movement had a stake and which could open possibilities for its revolutionary advancement.²²

Like many, Wallerstein was inspired by Frantz Fanon. Fanon was a very original voice, but he did not come out of nowhere. Though durably associated with Algeria, he was originally a student of Césaire’s and also from Martinique. He was informed by different strands of European thought and especially by the previous generation of transnational pan-African thinkers, many also from the Caribbean. Wallerstein met Fanon in Accra in 1960, the famous “year of Africa,” when 17 nations gained independence and Pan-African enthusiasm surged. Accra was a pivotal site for connections among pan-African intellectuals and activists. Fanon was an Algerian emissary to Ghana and other African countries and an important voice not only for African solidarity but for integration of African struggles with those of the diaspora and the oppressed and colonized globally. In April he addressed the Second Afro-Asian People’s Solidarity Organization

²⁰ In a later dialog between Étienne Balibar and Wallerstein ([1991] 2011), Wallerstein insisted on thinking race, nation, and class together and all as produced by historically change social structures.

²¹ Césaire wrote his famous “Letter to Maurice Therez” in 1956 as he resigned from the French Communist Party. See also Césaire, *Discourse on Colonialism* (2000).

²² James was also central to a transnational Black Marxism that overlapped pan-Africanism in important ways (Robinson 1983). The introduction to the 1995 edition of James by Robin D.G. Kelly is particularly helpful. More generally, James denounced Stalin’s subordination of communist internationalism to his attempt to defend the USSR by accommodation to Hitler—in the case of Abyssinia as well as Spain. He appealed directly to Trotsky with whom he felt more affinity, arguing that Black struggles should be accorded autonomy within the larger movement towards socialism. But again, he was disappointed.

conference in Conakry, Guinea. The same month, he gave his famous speech on “Why We Use Violence” to the Accra Positive Action Conference.

Wallerstein shared Fanon’s emphasis on seeing African independence as part of both a broader Pan-Africanism and a global response to both colonialism and its neocolonial continuities.

To build the nation is a crucial task for intellectuals, Fanon argued, but equally, the building of a nation is of necessity accompanied by the discovery and encouragement of universalizing values. Far from keeping aloof from other nations, therefore, it is national liberation which leads the nation to play its part on the stage of history. It is at the heart of national consciousness that international consciousness lives and grows. (Fanon [1961] 1963: 234–235)

Quoting this passage, Wallerstein (2006a, 2009) pointed to the “fundamental dilemma that has plagued all anti-systemic thought”: It is necessity to break with European universalism, which is false and distorting, to struggle in national terms, and yet to transcend merely national consciousness in a global, egalitarian struggle.

Wallerstein refused to join in the widespread tendency to claim Fanon for a romantic fantasy of either the necessary success of revolution or the power of violence as purification. He did not dispute Fanon’s famous argument that violence was inevitable in anti-colonial struggles, not just as a tactical matter but also because violence shaped both the individual subjectivity and the solidarity of the colonized. But he emphasized—as many readers did not—Fanon’s arguments against imagining that spontaneous rebellion could be enough to make revolution. Wallerstein did not argue that reform was much more successful than revolution in bringing real social emancipation. Rather, he held that emancipation required structural transformation. This was not produced by reformist regimes, but even revolutionary governments offered no guarantee of it.

Wallerstein saw Fanon once more while he was hospitalized in the United States just before his untimely death in 1961, but he returned to Fanon’s thinking recurrently. Wallerstein (2000b) appreciated the complexity Fanon brought to analyzing revolutionary subjectivity and struggle, reaching beyond conventional accounts of class to grasp politics grounded in distinct, not identical, social positions. Crucially, Fanon helped Wallerstein bring into focus the need to analyze African trajectories through the interdependence of African movements and self-understandings with broader, Eurocentric pressures, entanglements, and intellectual resources.

A crucial step toward world-system analysis was to see contemporary Africa as integral to modernity, not somehow outside its history or the residue of a prior stage of development. C.L.R. James ([1930] 2023) had already argued that the Haitian Revolution was part of an Atlantic modernity that included both Enlightenment ideals and plantation slavery. More generally, the Caribbean could hardly be understood as simply old or traditional; European intervention made and pioneering modern response remade it. This was a challenge to much Marxist analysis of the stages of development and the priority of Western bourgeois revolution over anti-colonial revolution. Marxism generally avoided the notions of incremental progress basic to conventional developmentalism but not the tendency to treat large parts of the contemporary world as though

they somehow represented earlier stages. Making the case for African modernity brought Wallerstein to clarity about the modern world-system.

The very idea of development needed to be rethought. In any case, catching up to Europe or North America was impossible. This was the famous message of a generation of Latin American analysts who drew on the work of Raul Prebisch (1950) to advance the notion that domination by a core of already developed countries limited the development of most others to paths of dependency. Andre Gunder Frank's (1966) account of "the development of underdevelopment" was particularly important for Wallerstein, both directly and as brought to bear on Africa by Walter Rodney's *How Europe Underdeveloped Africa* (1972).²³ Originally from Guyana, Rodney was yet another Caribbean leader in pan-African thought.

Years of engagement in Africa helped Wallerstein see more and more clearly the need for what became world-systems analysis. This was not only a rethinking of European history, but a recognition that this could not be understood without attention to empires, trade, and struggles that extended to Africa and the Antilles, Mexico, India, and the Indonesian archipelago.²⁴ Wallerstein helped to pioneer more global history, but at least in descriptive terms he was also quickly overtaken by it. Having established the world-system as a unit of analysis, he focused on its systemic characteristics—and the forms of resistance to it—more than on the many histories woven into it. He predicted the terminal crisis of the Soviet Union and offered compelling insights into the shifting world-system dynamics that followed the end of the Cold War. He engaged in discussions of a variety of different themes from the relationship between the Ottoman Empire and the capitalist world-economy to the place of cities or of rural economies. Many were collaborations with others in the world-systems network. But it was left to others to develop wider world histories. He never took up transformations in China and East Asia in the way that, for example, his collaborators Giovanni Arrighi (2009) and André Gunder Frank (1998) did.²⁵

1968, Binghamton, and Braudel

Africa brought Wallerstein not only ideas but networks and collaborations. He knew Walter Rodney, for example, through his frequent visits to the University of Dar es Salaam and later brought him to visit Binghamton. Tanzania was not just one new African state among many but,

²³ See also Samir Amin's (1972) nearly simultaneous "Underdevelopment and Dependence in Black Africa: Historical Origin."

²⁴ Evident in Volume I of Wallerstein's *The Modern World-System* ([1976] 2011), this became clearer in Volume II ([1980] 2011). Volume III ([1989] 2011) included an extensive consideration of the incorporation of new zones into the world-economy, and also the peculiar dynamics of "settler decolonization" of the Americas.

²⁵ Wallerstein (1999) did offer "The Rise of East Asia, or The World-System in the Twenty-First Century," but it was not substantial as either history or theoretical revision. Wallerstein was broadly sympathetic to Arrighi's argument, more critical of Frank's. But though the debate was carried out "on the new terrain of world history" (Stremlin 2001) it was really about the nature of socio-historical systems (or totalities), the level of analysis, and the temporal as well as spatial scale of world-systems. It continued earlier debates about eurocentrism and whether the "modern" world-system was sharply distinct from others more than it analyzed China.

like Ghana, a key point of connection among African liberation movements and allied intellectuals. Giovanni Arrighi moved to Dar in 1966, after having been jailed while teaching at University College of Rhodesia in what is now Zimbabwe. An Italian economist, it is ironic that his increasing engagement with Gramsci was shaped by his years at Dar. Partly influenced by Wallerstein, Arrighi remade himself as a comparative historical sociologist. In Francophone West Africa, Dakar was another crucial center for intellectual and movement connections. Samir Amin was central to both, not least as a founder of CODESRIA (the African Council for Social Sciences, modelled in part on the U.S. SSRC but also shaped by transformative African struggles). Wallerstein met Amin while visiting Dakar, shortly before meeting André Gunder Frank. In each case, there was quick recognition of common perspective. With Arrighi, they formed the “Gang of Four”—a crucial intellectual collaboration at the root of world-systems analysis. Together, they would explore a range of crucial issues, often writing books to which they contributed individual chapters in discussion with each other and joint introductions and conclusions.

Uprisings in Dakar and Dar were prominent in what Wallerstein would come to call the “worldwide revolution of 1968” (emphasizing a reach that many others missed). Wallerstein (1989, 200b) saw 1968 as a “watershed event,” “a revolution in and of the world-system,” in protest against both U.S. hegemony and Soviet acquiescence in that hegemony. Indeed, he argued that the “world revolution of 1968” was the most important political event of the twentieth century, more than the Russian Revolution. Together, Arrighi, Hopkins, and Wallerstein (1989) wrote: “There have only been two world revolutions. One took place in 1848. The second took place in 1968. Both were historical failures. Both transformed the world” (Arrighi, Hopkins, and Wallerstein 1989: 97). According to Wallerstein (2008, 2011, 2019a), 1968 brought two consequential changes: “dethroning centrist liberalism from its long-held position as the dominant and uncontested ideology of the world-system, and the definitive and meaningful entrance of the ‘forgotten peoples’ into the ongoing political struggles of the world-system” (Wallerstein 2008: 2)

The 1968 events were an important demonstration of Wallerstein’s growing convictions that (a.) social transformations come not in incremental but rather in discontinuous, disruptive fashion, and (b.) that all modern capitalist history (including political history) is interconnected through the world-system. They constituted what was a “great rehearsal” for new anti-structural movements seeking to make inevitable change be positive change. This changed the nature of movements, Wallerstein argued in a dialog with Grace Lee Boggs (Wallerstein and Boggs 2012), by ending the assumption that coherence in a single hierarchical movement was necessary.

Wallerstein held that social structures (or systems, in the term as he came to prefer) inevitably generated internal conflicts beyond what the dominant could readily contain or manage. Sometimes this brought revolutionary change, but as basic as rebellion was the recurrent tendency for dominant classes to lose ability to maintain high levels of gain and privilege. Either way, Wallerstein focused on disruption and transformation, not just incremental adjustment and change. Whether in approaches to domestic progress or theories of international development, an incremental approach was basic to what Wallerstein (2011) termed “centrist liberalism.” It recognized neither the internal contradictions that led to crises and setbacks nor the potential for

fundamental reconfiguration of the system. It naturalized existing structure and imagined change only within its parameters.

The New Left of the 1950s and early 1960s was in part a rebellion against such centrism, against the illusions of neutrality, and against the notion of knowledge not linked to action. Mainstream academic research commonly seemed affirmative of the status quo even when intended to facilitate incremental progress.²⁶ It seemed distant from real world challenges like racism and the threat of nuclear war. Sociology was prominent in the New Left, but not for approaches that took radical change off the table. Wallerstein's teacher, C. Wright Mills, a New Left pioneer who engaged the power structure of American society and the chances of a Third World War, was revered not least for his criticisms of the affirmative character of Lazarsfeld's approach, which he skewered as "abstracted empiricism" (Mills 1959).²⁷

Within sociology, Wallerstein was part of the "conflict" alternative to Parsonsian functionalism, with its greater emphasis on cohesion and consensus. In the 1960s, this seemed to unite Marxists, Weberians, and indeed microsociological analysts of symbolic interaction, phenomenology, and rational choice despite all the differences among them.²⁸ Consistently, though, Wallerstein resisted voluntarist approaches to politics that neglected structural underpinnings. He saw the 1968 events as occasioned, thus, not just by longstanding issues like racism or Romantic searching for self-expression but by the transition from the expansion and support for hegemonic power in a Kondratief A phase to the contraction, crises, and loss of hegemony in its B counterpart.

Wallerstein was teaching at Columbia in 1968 and became one of the most visible faculty opponents to the harsh, anti-protest policies of the university administration (Wallerstein and Starr 1971). It is worth recalling that there were two distinct student mobilizations at Columbia—mostly white and mostly Black—with different immediate agendas and trajectories. The first, linked to the Students for a Democratic Society, was partly a rebellion against an older Left as well as an antiwar movement. The Society of Afro-American Students (SAS) focused on local Columbia engagements and tensions with Harlem neighbors but was also part of the larger African American struggle with roots in the Civil Rights Movement and its domestic radicalizations and with international engagements informed by Fanon and Pan-Africanism. When police were called in and faculty supporters had to choose which to defend, Wallerstein stood with SAS. He was impressed with the discipline of the SAS, which made a deal with police to exit quietly from the building it occupied. The SDS made no such deal, its own lack of discipline contributing to police violence (Wallerstein 2018).

²⁶ On the construction of "mainstream sociology" from the vantage point of its critics, see Calhoun and VanAntwerpen (2007).

²⁷ Mills also criticized Parsons' grand theory, but if he mocked this as unreadable, he presented abstracted empiricism as outright dangerous because it made sociology a support for bureaucratic domination.

²⁸ The most prominent attempt at synthesis was Randall Collins, *Conflict Sociology* (1975).

Columbia's reactionary response helped to precipitate Wallerstein's departure from the university where he had completed all his degrees and risen through the faculty ranks. The 1968 uprising was a watershed in personal terms and development of world-systems analysis as well as in transformation of the world-system. Wallerstein moved to McGill in 1971. Terrence Hopkins left Columbia in 1968, to be a visiting professor at the University of the West Indies and then in 1970 founded the graduate program in sociology at Binghamton University. There he helped lay the foundations for the Fernand Braudel Center that was launched when Wallerstein moved to Binghamton in 1976. Arrighi joined in 1979. The Braudel Center became the primary point of connection for a remarkable—and remarkably international—range of scholars and PhD students, many also activists.

For Binghamton to be the center of global networks was more than a little paradoxical. As the love of Immanuel's life, Beatrice Wallerstein, never tired of pointing out, it was the middle of nowhere and too far from anywhere. Accepting the disruption of her career as a child analyst, Beatrice nonetheless followed Immanuel to this upstate New York outpost. She accompanied him on nearly constant travels and was in the front row at innumerable speeches—though not without grumbling about how far the modern world-system took her from their grandchildren. She became part of the support system for innumerable students as well as Immanuel himself. Immanuel poured enormous effort and considerable organizational skills into the Braudel Center. But it is worth remembering that it demanded and offered community as well as intellectual projects and that there was a gendered dimension to this.

At almost the same time, though, Wallerstein established a second intellectual home in Paris. Fernand Braudel responded to the publication of *The Modern World-System* by inviting Wallerstein to spend 1975–1976 at the *Écoles des Hautes Études en Sciences Sociales*. Wallerstein resumed the position at intervals, bought an apartment on the Île de la Cité, and convinced the immensely loyal Beatrice to come along. Extended stays in Paris were disruptive, she would say, but was nothing compared to having to move to Binghamton. Immanuel would roll his eyes. Wallerstein remained an active member of the *Maison des Sciences de l'Homme* for the rest of his life. Paris was perhaps an indispensable center for global intellectual connections and efforts to think the world under American hegemony without American intellectual blinders. To write presciently about the decline of American power, as he did notably in 2003, it helped to have a broader perspective both geographically and historically. For Wallerstein, great cities, universities, and academic and political associations were all sites of collaboration, connection, and perspective. We were together in New York, Abu Dhabi, Moscow (and Yaroslavl), Montreal, Brisbane, Mexico City, and more, as well as Paris. Where he could, he read local papers. In every setting, Immanuel patiently made time for students, activists, and reporters; translators, colleagues, and old friends; and even politicians who wanted to show they had an intellectual side too. Beatrice was not always equally patient.

The Wallerstein-Braudel connection was strong. With Braudel, Wallerstein became articulate about shifting the basic unit of analysis for social science and breaking with the old, unhelpful opposition of idiographic to nomothetic research. Almost as important was Braudel's approach to

history of the *longue durée*, that is, of structures that secured continuity over centuries even while accommodating change and allowing for the middle-duration history of conjunctures and more temporally focused events. Marxist accounts of stages of development were as problematic in these regards as linear approaches to development in modernization theory (Wallerstein 2000b).

The Modern World-System (Wallerstein [1976] 2011, [1980] 2011, [1989] 2011, 2011) is arguably at least as Braudelian as Marxist. Braudel offered powerful arguments for breaking with standard Marxist as well as classical liberal views of capitalism and markets. Far from equating the two, he showed capitalism to be in deep ways anti-market. His idea of a world-economy was basic to Wallerstein's analysis of the modern world-system.²⁹ In this, he identified two pervasive roles for the state—as regulator and guarantor—on opposite sides of freedom for capitalists. The state was pivotal to control of the labor force and to efforts to enforce advantages like intellectual property rights. Building on Braudel, Wallerstein (1991a) also emphasized long-distance trade, speculation, finance, and the pursuit of monopoly in contrast to the ordinary routines of material life, competition, and inequality in places of production. Where Braudel saw ubiquitous potential for world-economies to be overtaken by world-empires, Wallerstein emphasized the distinctiveness of modern capitalism with its reliance on nation-states and absence of centralized power above states.

Wallerstein discovered Braudel as he intensively read European as well as imperial economic history from the late 1960s. Marion Malowist's (1964, 1966; Batou and Szlajfer 2012) studies of the gold and slave trades along the West African coast were pivotal, not least pointing point Wallerstein to Braudel. Polish himself and embedded in analyses of Eastern European as well as African trade and development, Malowist also led Wallerstein to focus more on Eastern European economic history and thus on commonalities with Africa (and imperialism globally). Prebisch (1950) had made the distinction of industrial core to agrarian (and extractive) periphery central to development theory and especially ideas of dependent development. Wallerstein insisted on adding a third structural position—semi-periphery—as crucial to world-systems. This generated important pressures as countries competed to break into the core and/or avoid sinking into the periphery.

Wallerstein suggested that modern capitalism might be rethought as a world-economy based on an international division of labor. Emphasizing spatial organization and internal structural hierarchy facilitated a break with conventional theories of stages in economic development as internal features of national histories. Wallerstein ([1980] 2011, 1992) challenged at once the views that most of Africa and the “less developed” world were not capitalist, or not yet capitalist, or insufficiently capitalist and that a phase of “refeudalization” separated Eastern Europe from the story of the West. At issue was partly whether free labor was a requisite for capitalism or one

²⁹ Wallerstein was already thinking of such patterns and reading Braudel's *The Mediterranean and the Mediterranean World in the Age of Philip II* ([1949] 1996), helped consolidate this shift in his thinking.

possibility within capitalism alongside enslavement and other forms of unfree labor, and whether the take-off of capitalism depended on wealth amassed outside capitalist production relations.³⁰

Wallerstein's insisted that historical capitalism—and thus the modern world-system—had a specific origin in the sixteenth century. Braudel had seen earlier roots amid empire and commerce not anchored in nation-states (Arrighi 1998). Abu-Lughod (1991) analyzed a thirteenth and fourteenth century world-system preceding European hegemony. Frank (1998) later suggested that capitalism was historically ubiquitous. Wallerstein insisted on sixteenth century origins not only because of arguments about primitive accumulation and colonialism, but because having a clear origin was crucial to the expectation of finitude and an eventual end. Capitalism arose, he suggested, partly because of a breakdown in historical barriers against this particular version of systematic exploitation.

Like Marx, Wallerstein emphasized both the necessity of struggle against historical capitalism in its various institutional forms and the inevitability of the collapse of capitalism. Knowledge was part of the struggle and an (inevitably limited) preparation for the future. He constantly monitored and supported movements for transformative change—whether national liberation movements in Africa, or workers movements in the United States, or the many different lines of struggle linked in the “world revolution of 1968.” He hoped (but did not predict) that the “Spirit of Porto Allegre” might triumph over the “Spirit of Davos.” He wanted the world to become more democratic and more equal. He did not expect perfection.³¹

As he put it (writing with Arrighi and Hopkins), “opposition to oppression is coterminous with the existence of hierarchical social systems.” Most of the time, the oppressed are too weak to gain much. Since the mid-nineteenth century, though, the rise of “organized anti-systemic movements” (Arrighi, Hopkins, and Wallerstein [1989] 2011: 29) enabled mobilization to be continuous rather than episodic, and to change the terms of struggle. This was the basis for hope.

Thinking about struggle, and shifting directions of the world-system, Wallerstein balanced interest in the systemic properties of historical capitalism as a world-economy and in the ways human action could shape historical patterns. He studied the former more systematically but was always interested in the latter. To the end of his life, he was determined to face the world of today with the insights of macro-history and an openness to transformation. He embraced the three temporalities suggested by Braudel, recognizing the power of some specific events—like the world-revolution of 1968—but focusing most on the relationship between conjunctures and durable structures. Braudel's *longue durée* included patterns that could transcend the rise and fall

³⁰ These arguments (to which I cannot do justice here) intersected debates over the relative prioritization of commercialization and production-centered class struggle and technological development in explaining European capitalism. Arguing the latter case, and not considering Braudel, Robert Brenner (1977) somewhat misleadingly associated Wallerstein entirely with the former view. The last 50 years have brought deeper attention to enslavement in both plantation agriculture and extraction through mining, with implications for questions about whether late capitalism depends on a growing prevalence of unfree labor (Rioux, LeBaron, and Verovšek 2020).

³¹ “There ain't no such thing, but we can do a lot better than we have done historically in the capitalist world-system” (Wallerstein and Boggs 2012: 209).

of world-economies and state systems, but Wallerstein was most interested precisely in this dynamic.

This became clearer from the early 1980s, as he engaged more and more with complexity theory, especially as advanced by Ilya Prigogine (Wallerstein 2004a). Seeing dynamism and indeterminacy at all scales of organization from the most microscopic to cosmology, Prigogine analyzed the production and dissipation of order, always moving in linear time, with entropy not reserved for a specific set of processes. Dissipative processes might be slowed, as viscosity slows the dispersal of a fluid. By extension, social organization could resist entropy but not forever. Wallerstein took this to mean that “social systems have lives—beginnings, normal development, and terminal crises” (Wallerstein, Rojas, and Lemert 2012).³² He thought historical capitalism was in its terminal crisis (Wallerstein et al. 2013). What would come next was unpredictable. “We could call this the period in which ‘free will’ prevails.” It was also “transformational time”—Kairos, or the right time—when “it is necessary to make a profound, mental, and moral decision” (Wallerstein et. al. 2012; Tillich 1948).³³

Wallerstein was blunt and uncompromising in his assessments of modern capitalism, the world-system it dominated, and much of contemporary social science. He never stopped intellectual struggles and innovations. He fought many of the same intellectual battles throughout his career. He shared some with his teachers, notably Mills and Polanyi. Yet macrohistory and attention to the most pressing social problems both continued to be obscured by the opposition of grand theory and abstracted empiricism, nomothetic and idiographic approaches.

For a Different Social Science

From the 1970s, Wallerstein turned his attention increasingly to institution-building for a new social science. For all his criticism of the blind spots and false divisions of mainstream social science, it should not be forgotten that Wallerstein wanted to remake social science, not abandon it. Advocacy and analysis of possibilities for a reorganized social science was a bridge between Wallerstein’s institutional and intellectual concerns. The Braudel Center, the journal *Review*, and related networks of inquiry, engagement, and publication were all central. He was President of the African Studies Association in 1972–1973 and the International Sociological Association (ISA) from 1994–1998. He served on a variety of boards and commissions and chaired the Association of Friends of the *Maison des Sciences de l’Homme*.

At the same time, Wallerstein was completing successive volumes of *The Modern World-System*. His inquiries into knowledge were closely connected. Notably, Volume IV was not the originally planned study of expansion, structural differentiation, and crisis in the late nineteenth and early twentieth century world-system. Rather, it developed the new theme of the nineteenth

³² Wallerstein said he followed Braudel and Prigogine in this. Both emphasized the finitude of particular phases of organization, but neither relied on the metaphor of lives as Wallerstein did.

³³ While he was at Columbia, Wallerstein followed Paul Tillich’s courses at Union Theological Seminary across the street.

century emergence of a geoculture for the modern world-system (Wallerstein 1991b, 2011). Not surprisingly, the geoculture of the modern world-system was also Eurocentric, reflecting European hegemony in that world-system. As the hegemony of Europe and countries settled by Europeans declined, its geoculture had to change or become a focus of systemic tension.

When Wallerstein and Hopkins created their new center at Binghamton, they named it the Fernand Braudel Center for the Study of Economies, Historical Systems, and Civilizations. Though inevitably shortened, the full name was homage not just to a brilliant individual but to a broader intellectual project associated with the journal named (from 1946–1994) *Annales. Economies, Sociétés, Civilisations*. Their vision was of multidisciplinary inquiry, indissolubly combining history and social science, and looking across multiple scales and dimensions of organization (Wallerstein 1978).³⁴

For all its strengths and ambitions, the *Annales* School also offered an object lesson. It was richly multi-disciplinary. Braudel had founded highly productive institutions devoted to bringing the human sciences together in different combinations. And yet, these were not able to resist the pull of disciplinary organization and power in the university system. By its “third generation,” the *Annales* School was reproducing the pernicious division between nomothetic and ideographic approaches its founders had challenged—testing theories with quantitative data in ways little different from mainstream social science and pursuing the study of mentalities and everyday life in “microhistories” (Wallerstein [1991] 2001).³⁵ In the United States, sociology reproduced old divides with new demographic and network structural approaches, and renewal of both rational choice and symbolic interactionism. Interdisciplinary area studies fields suffered both disinvestment and displacements from disciplinary agendas and journals, especially in the nomothetically-inclined social sciences.

It was not enough to connect across disciplines, Wallerstein concluded, a fundamental reorganization of social science was needed to liberate and fulfill the potential of historical social science. The old organization of social science was not just tiresome, as Wallerstein had long thought disciplinary divisions and the opposition of ideographic to nomothetic research to be. It was ideologically at odds with pursuing a more democratic and egalitarian future. Centrist liberalism shaped the prevailing ideology and disciplinary framework of social science as well as the liberal state. Indeed, the assertion of value-freedom Wallerstein had first encountered at Columbia was not just an accidental feature of social science concerned with objectivity, elimination of bias, and respectability, but also part of the ideology legitimating historical capitalism.³⁶

³⁴ There were, of course, other approaches to large-scale, *longue-durée*, and interdisciplinary history. Wallerstein was especially sympathetic to the work of William H. McNeill ([1963] 1991, 1982).

³⁵ Late in his life, Wallerstein watched a continued struggle to maintain Braudel’s distinctive institutions, not least as Chair of the Friends of the Maison des Sciences de l’Homme. A national higher education reform displaced them from the center of Paris and incorporated them into a more conventional university structure.

³⁶ This ideology was embedded in the geoculture of the modern world-system, not least its distinctive division of the sciences from humanities as “two cultures” (Wallerstein 1997, 2011).

Most pointedly in *Open the Social Sciences*, the report of the Commission he organized with support from the Gulbenkian Foundation, Wallerstein (1996) laid out an agenda to reconfigure research by method rather than discipline. This would group together quantitative researchers from different disciplines who would seek law-like generalizations and theories based on decontextualized abstractions. It would group together ethnographers and others inquiring into the organization of social life at its smallest scales. And it would group together those pursuing historical social science. Curiously, Wallerstein devoted little attention to how these different approaches might be combined or produce work illuminating different aspects of common questions. He focused little on rethinking how each of these might jointly contribute to social science knowledge—for example, how ethnography might be not merely particularizing but informative about life and action in different contexts specified by world-systems analysis or how quantitative studies might bring precision to grasping the stresses bringing crisis to historical capitalism.³⁷

In fact, work employing diverse methods and intellectual approaches flourished at the Braudel Center and with Wallerstein's support. But his heart was in the project of historical social science which he continued to define in opposition to the (ostensibly) ideographic and nomothetic. He saw the break from conventional disciplinary perspectives as basic and liberating. It is thus no accident that Wallerstein's (2004b) short introduction to *World-Systems Analysis* starts with a comment on achieving this interdisciplinary perspective. This literally made possible the study of historical capitalism, the vicissitudes of the modern world-system, and the openings offered by anti-systemic movements. He found encouragement in the flourishing of other macro-historical projects—William McNeill's, say, or Michael Mann's—even if they remained exceptions to disciplinary norms.

Wallerstein's push to open social science across disciplinary and methodological divides was also a push to open social science to what was important and potentially transformative in the world.³⁸ It was not just improvement for abstract epistemic purposes, but epistemic improvement needed because conventional methods blocked attention to many of the most pressing and momentous questions. Knowledge locked in older frameworks was simply not adequate in his view to an era of global crises, anti-systemic struggles, and the decline of American Power. The prevailing disciplinary structures had impeded recognition of how basic transnational social

³⁷ Wallerstein (2003) revisited the call to open the social sciences in his 2002 Sidney Mintz lecture, "Anthropology, Sociology, and other Dubious Disciplines." Asked to publish a comment, I expressed sympathy with his project but also surprise that he in effect reinstated the ideographic and nomothetic as two legs of a now three-legged social science stool along with macro-historical social science.

³⁸ Among Wallerstein's most important efforts were the collaborative project, *Open the Social Sciences: Report of the Gulbenkian Commission on the Restructuring of the Social Sciences* (1996); and the collections of earlier work *Unthinking Social Science: The Limits of Nineteenth-Century Paradigms* ([1991] 2001) and *The End of the World as We Know It: Social Science for the 21st Century* (1999). While much of this work was aimed at the dominant Western universities, Wallerstein also tried to shape how the social sciences developed globally—through the Braudel Center, through the ISA, and through edited volumes like *Overcoming the Two Cultures: Science versus the Humanities in the Modern World-System* (Lee and Wallerstein 2004).

connections were to the whole modern era of historic capitalism. Despite the contributions of Du Bois and C.L.R. James, for example, enslavement was largely ignored and the “international color line” was reduced to domestic race relations. Empire all but disappeared from view.³⁹ World-systems analysis did help to change this. Giovanni Arrighi ([1994] 2010, [2007] 2009; Arrighi and Silver 1999) brought finance and governance into world-systems focus.⁴⁰ Attention to new technologies, global public health, and climate change has lagged. Overall, world-systems analysis itself has been more contained by discipline and dominated by older intellectual problems than Wallerstein hoped. It is due for reinvigoration, but perhaps this would be a case of the owl of Minerva flying at dusk.

Wallerstein had no doubt that historic capitalism was failing to meet the challenges it faced. Those with interests in power and property were already turning away from it, he thought, trying other ways to secure their interests. Self-protective responses from the Davos class could jettison capitalism as previously known, but in doing so easily make matters worse. He knew the Davos crowd had wealth and weapons on their side. But despite a cheerful pessimism about the probabilities, he was optimistic enough to work tirelessly to try to beat the odds, always insisting there was at least a chance of a more liberating future. In the bifurcation he saw between the spirit of Davos and that of Porto Allegre, he had no hesitation backing the latter.

In his intellectual work and his advocacy, Wallerstein balanced a basic structural determinism with hope, an attraction to law-like regularities—like Kondratieff waves—with Prigogine’s (1997) account of a world in which certainties do not exist but knowledge still does. He loved the notion that growing volatility and chaos brought not merely indeterminacy but the nonlinear chance for concerted action of the less powerful to have greater effect. This was Wallerstein’s image of the epochal change underway: an era of mounting challenges was met by inadequate or sometimes overly forceful reactions that together drive the system further and further from equilibrium. In the very instability of a system bifurcating and swinging ever further from equilibrium he saw the relative freedom of the butterfly effect. Small actions can make large differences. “We’re all butterflies ... and we’re flapping our wings and it depends how many people flap their wings in the right direction” (Wallerstein and Boggs 2012: 209).⁴¹

From his roots in immigrant New York and Columbia College, through durable engagements with politics on the Left and efforts to reform academic social science, Wallerstein had become

³⁹ See the efforts to bring empire and enslavement back into classical sociological theory by Gurinder Bhambra and John Holmwood (2021) and George Steinmetz (2023). Julian Go (2011) has long sought to put empire on the analytic agenda for American sociology.

⁴⁰ Arrighi’s work took off from Braudel and analyzed the centrality of finance to the reproduction of hegemony. His work influenced Greta Krippner (2011), who did do pathbreaking analysis of financialization though not mainly in a world-systems perspective and mostly focused on the United States at a national scale. The three volumes on financial crisis edited by Craig Calhoun and Georgi Derluguian (2011a, 2011b, 2011c) include preliminary world-system analyses, but are not a substitute for the missing sustained study.

⁴¹ The words were spoken before a huge crowd at the U.S. Social Forum in 2010. The transcription dryly notes: “Big applause as audience members flap their arms like butterflies.”

one of the world's towering intellectuals. He had such stature that many were surprised to find him also a warm and witty human being.

Wallerstein did not live to finish his multivolume effort to analyze the history of the modern world-system, though the books he did finish are remarkable. In his public farewell, he noted again the fragility of the modern world-system. He called on "those who will be alive in the future" to struggle for real change, for positive transformation. "I still think," he wrote, "that there is a 50–50 chance that we'll make it ... but only 50–50" (Wallerstein 2019b).⁴² As he often added, with a sly smile, "50–50 is a lot, not a little" (Wallerstein and Boggs 2012: 209; Wallerstein et al. 2013: 35).⁴³ Immanuel Wallerstein loved the world, and he engaged and knew it much more widely and deeply than most of his peers.

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⁴² Wallerstein had offered versions of the 50–50 prediction in interviews and essays for decades.

⁴³ This was one of Immanuel's favorite lines, repeated frequently.

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