

WALLERSTEIN, ARRIGHI AND AMIN: IMPERIALISM IN FORDIST CAPITALISM

Luiz Felipe Brandão Osorio¹

Introduction: Fordist Capitalism

Always current and present, imperialism has never ceased to cast a shadow on International Relations. On the contrary, even when considered to be outdated, it shaped the world's directions, following the tune of transformations of capitalism. Now, amid the centenary jubilee of the first debates, imperialism has resumed its charge at full power. After a short interregnum of illusory prosperity at the threshold of the transition between centuries, the term returns to the mouth and ears of operators and scholars of international relations. Today's role is largely due to the practical and theoretical directions that impacted the study of the state system. Reflecting on this word is not a simple exercise. It translated the direction of the development of capitalism since the 19th century, having oscillated like no other in the systemic trajectory.

Imperialism and international relations gain specific content precisely in the consolidation of capitalism as the predominant mode of production globally. The themes are directly interrelated. Therefore, criticizing one means touching everyone to a greater or lesser extent. In this sense, many authors set out to criticize international capitalism. Few have been successful in resisting time and difficulties, being recognized until today by several generations. These deserve special mention. Although situated in their historical time, they were thinkers who were not linked to a national geographic space, being considered intellectuals of the world. Furthermore, if their power in ideas was not enough, they also gained notoriety for their political and militant engagement, always in the uncompromising defense of the periphery and against inequalities in development. In this pitch, it is worth discussing Immanuel Wallerstein, Giovanni Arrighi, and Samir Amin.

1 Adjunct Professor of Law and International Relations at the Universidade Federal Rural do Rio de Janeiro, Brazil.

The three were notable for their fearless criticism of liberalism and the direction of world capitalism. As they lived for many years, they underwent important transformations in the international system. And they became indispensable authors for the critical studies of international relations. Even if it is to refute its premises, it is necessary to read and understand them. Their perspectives are closer to each other than they are apart, despite the marked dissonances. The reason for the many points of convergence is due, among other factors, to the historical moment of capitalism in which they built their positions. As sons of their context, they developed their ideas from a point in the trajectory of capitalism that largely explains their premises and postures: that of Fordist capitalism.

The meaning attributed here to the term characterizes a pattern of development of capitalist production relations. Despite the origin of the term referring to the homage to Henry Ford who pioneered the conveyor belt in the assembly of automobiles, the Fordism discussed here touches the meaning given by the materialist theory of the State and by the French regulatory school and is not confused with the semantics given by Gramsci (2008). Fordism is not related to the ideas of organization of industrial production originally derived from Frederick Taylor, but rather encompasses a pattern of development, composed of the accumulation regime and mode of regulation corresponding to a specific historical period of capitalist development, driven by the crisis of 1929 and the Second World War (Jessop 1991). The post-1945 era was sewn under a model based on two foundations: the internal, national accumulation regime, structured along the lines of what is known as industrial capitalism; and the mode of state-interventionist regulation (Keynesian or social well-being), with legal and bureaucratic provisions on social experience, in the search for well-being, consumption, and growth.

The new cycle of capitalism that opens after the economic crisis of 1929 and the ensuing World War II and goes until the debacle in the 1970s has very particular historical and theoretical contexts, causing an interim of exceptional and punctual relative stability in the trajectory of the center of accumulation of the capitalist system (which did not reach the periphery). The moment of economic recovery and political composition around social democracy as weapons of containment of the spread of the victory of the Russian Revolution changed the face of the pattern of development of capitalism. Unquestionably, a scenario of economic growth on a world scale has been reconciled, accompanied by a substantial increase in social indices. The emergence of the United States, as a hegemonic power, and the rise of the Soviet Union, which symbolized the arrival of the left to power (as well as Euro-Communism), and the spread of capitalist relations across the quadrants

of the world map, gave capitalism a new face.

In this scenario, workers' struggles and the reorganization of capitalist structures are shaped. From the strongly liberalizing conceptions radiated earlier, it went for: concessions to labour through the expansion of rights; the anchoring of production relations on national-state bases, with the promotion of aggregate demand, growth and mass consumption; and the regulation of capital flows around the world through the formal and informal configuration of American hegemony. Liberal capitalism migrated to a compromise solution around Fordist capitalism, an adjective that qualifies what we can call the second debate².

In this dynamic, with the lefts in power, either by revolutionary means or by the social-democratic commitment, and with the relations of production spreading all over the globe, theoretically, an unprecedented scenario emerges. Marxism as a whole inaugurates the Western tradition (and consequently the Eastern one)³ and, gradually, the reflections on imperialism expand, extending the limits of the European continent and encompassing other regions around the world, establishing a duality: of central conceptions, which deny and reaffirm imperialism, adapting it to the new conditions; and visions focused on the periphery, which contribute and innovate substantially to the debate, thus being the subject of a more detailed investigation. In this pitch, there is the theory of monopoly capital (Baran and Sweezy), the Marxist dependency theorists (Frank, Dos Santos, Bambirra and Marini) and the third-worldists⁴ (theorists of the world-system and unequal exchanges, such as Wallerstein, Arrighi, and Amin). The latter will be analyzed in this article.

The concept of imperialism itself, very much identified with the pioneers, with traditional Marxism and its historical context, is revised and, inevitably, eclipsed. In addition, the concept of imperialism was diluted (if not pulverized) in other wider elements. This was due to the fact the concept itself was closely linked to conditions that had dissipated such as the economic base, to the capitalist structure, and Marxist reflections were directed towards the superstructure (philosophical, political, legal, and ideological aspects),

2 The pioneering debate of imperialism took place in a very specific historical and theoretical context that goes from the late quarter of the 19th century to approximately the Second World War and is the pioneer and best known about the understandings of imperialism (Osorio 2018).

3 Anderson 2004, Losurdo 2018.

4 Without any pejorative connotation, without pretending to claim the superiority of the arrogance of the said First World, on the contrary, highlighting the autochthonous and original character of the reflections, third-worldists refer to those who emphasize on uneven exchanges and to the world-system theory, as it is classified by a good part of the doctrine originating from the central countries. For more, see Brewer (1990); Barone (1990); Carnoy (1994); Nogueira and Messari (2005); Noonan (2017).

as well as to the context of accumulation crisis, interstate competition, and systemic wars policies.

At the center, the notion of imperialism was either rejected or updated. In the periphery, the significant contributions came from applying the teachings of the pioneers to the local reality. What is new here is the redirection of the focus to the periphery and its structural problems, which are radically different from those of the capitalist center. It is, therefore, understandable that imperialism is not the focal point of the analyzes. It ends up being carried away amidst the urgency of the emphasis on other aspects, of theorization still recent in the world panorama, as the domination of the center over the periphery and the dependence relations of this one to the central capitalism by the commercial exchange, transfer of value or by the unequal exchanges, as well as the international division of labor and the world-system.

The discrepancy between center and periphery becomes unavoidable not only because of the expansion of capitalism in the world but also because of the relative prosperity that the center had enjoyed in relation to the marginal regions. Therefore, it is in this panorama that the novelty shines. The engagement and revolutionary struggles were important ferments in the construction of autochthonous critical thinking. Europeanism⁵ predominant in pioneering views, required to be broken, since there were specific demands from the peripheries that were seen as pressing, not being capitalism and its unfolding exclusive to a region. It is from Europe that imperialism becomes the subject of intellectuals of the most diverse nationalities in the four corners of the world.

The unit of analysis is not national social formation and class correlation, but the world system, as a whole, having distinct geographic areas, and the States of this whole being parts. Imperialism ceases to be pointed out as a consequence of the expansion and development of capitalism, as it was previously, to be read as an element of the exploitation relations of the advanced countries regarding the backward. It is a purpose much more external to capitalism and the State than to the political-economic dynamics.

Capitalism is not defined by a specific class relationship, but by production for profit, in a worldwide system of exchange, and by the exploration of areas by others. The forms of exploitation occur in three

⁵ Not that it is stated here that the pioneering authors were purposefully excluding. For example, Lenin himself, with more emphasis, had already denounced the existing inequality. The Europeanist bias was natural in the meantime and inherent in the limits of capitalism at the time. The adjective in question addresses the inevitable centrality of European thought about imperialism at that time, still restricted to the political cycles of that continent. Even so, this feature of pioneering imperialism was criticized, such as that of Amin (1977a).

ways, basically: monopolistic control of trade, extraction of the surplus value from the periphery to the center, and unequal exchanges. In this dynamic, capital accumulation is not a precondition for qualitative advances in levels and methods of production, but it is a redefinition of the fixed magnitude of resources from the periphery to the center. The world system is not that of the 19th century, the historicity here is different. It was born in the 16th century, in a relatively static logic of exploitation. Because capitalism is inherently incapable of generating world prosperity, it needs to be overcome.

In line with the Fordist debate, many would put Wallerstein, Arrighi, and Amin together with Marxist dependency theorists in the same vein, called by many the third worldist. Mainly, Wallerstein and Amin are often placed under the same label, as members of the dependency theory, as do Carnoy (1994) and Barone (1985). Brewer (1990) still includes Arrighi in this aspect and segregates Emmanuel's unequal exchanges, concerning what he calls dependency theorists. Noonan (2017) also unifies them in the same group, calling them neo-Marxists. Martins (2011), on the other hand, separates them, placing Amin as a neo-developmental socialist and Wallerstein and Arrighi as theorists of the world system. Nogueira and Messari (2005) attribute to Amin a more nationalist perspective within the theoretical aspects of dependence and differentiate Wallerstein from him due to the American Marxist structuralism. Despite some similarities of the theoretical contributions, there are important divergences, therefore, it is imperative to separate their ideas, giving each one the centrality of their contributions. On the other hand, it would not be an exaggeration to state that it is a system-world group, within which there is a vector that specializes in unequal exchanges. Therefore, the most striking difference is in the breadth of the analytical north. Thus, the broadest lens, that of world-system theories, and the most specific, that of unequal exchanges, will be mentioned.

As for the political economy of world-systems, authors Immanuel Wallerstein and Giovanni Arrighi will be approached with greater emphasis, without disregarding the relevance that other exponents such as Terence Hopkins and Beverly Silver, according to Martins (2011), have for this aspect. About unequal exchanges, it is worth making a synthesis of ideas here and highlighting the one who got more prominence in the combination of inequality and imperialism, Samir Amin. These theories marked an era in the historicity of imperialism, nourishing discussions until today, in the promotion of independent and autochthonous thinking on the periphery about its reality.

Wallerstein and the World-System

Immanuel Wallerstein stood out as an organic intellectual, mixing academic performance with political activism. Born in 1930, in the United States and studied in New York and quickly aroused his interest in the anti-colonial movement, notably the Indian. Unfortunately, he died in 2019. He was a professor of sociology at several universities around the world, subsequently receiving honors worldwide. Neither his performance nor his thinking was limited to national borders. On the contrary, their nationality is not always remembered. Because his experience and maturity occurred during the 1950s and 1960s, that is, in the immediate second post-war period, his object of study was, as a critical thinker, the processes of decolonization (so much so that his first published books are about the African uprisings against the metropolises). In other words, he was a man of the moment of internationalization of capitalist relations of production beyond the European continent, on the time when capitalism became an international mode of production.

What was not a trivial transformation, but it occurred based on a lot of sweat, blood, and tears, in a period of boiling on the fringes of the globe. Both the socialist revolutions and the nationalist uprisings in the periphery demonstrated that the relative stability and prosperity of the post-war did not replicate beyond the center. Also, the burden of centuries of colonization revealed that independent peoples no longer agreed with any interference and valued their solutions to internal issues. Thus, the movement of non-aligned countries emerged, emphasizing the importance of the autonomy of the said Third World in international dynamics. Wallerstein was very sensitive to these issues, so he directed his studies, initially, to understand how the international whole was built and works, what he came to call the world-system. What to look for in-depth in the history of the roots of European colonization in the world, as well as, later, to study the developments in the peripheral spaces. What earned him the qualification of a third world theorist, even though he came from the great capitalist power and even though he rejected this analysis divided into three levels of the international system.

Its holistic perspective of the world-system is not restricted to a continent or a region, but embraces the world as a continuous and long-lived whole, resuming its historical origins since the beginning of the capitalist vestiges. He sets aside methodological nationalism to deal with theoretical categories together, forming a particular whole. The American, therefore, becomes the founder and patron of a strand of thought that will add great exponents of critical theories and will support native studies on the international periphery.

Due to its international projection, its ideas had great capillarity, spreading throughout the world, forming generations of internationalists and being still essential for any critical study⁶.

The guiding thread of his conceptions can be pulled from the iconic work *The Modern World-System, Volume 1* (1974), which paves the way for the world-system, which will fertilize several sophisticated studies on the subject. Such is the ambition of the undertaking, it led him to publish three more volumes, in 1980, 1989, and 2011, respectively. In a context of questioning the prevailing international order, critical studies are aimed at constructing anti-systemic theoretical alternatives that would escape the defense of liberalism by Anglo-Saxon hegemony and the official Marxism of the Third International. The author summarizes theoretical positions, ranging from Braudel and Marx to Weber to support their historicity of capitalism and understand the roots of the current system.

In his trajectory, he returns to the roots of the transition between feudalism and capitalism in Europe, going back three centuries, comparing to Marx, in medieval agriculture, in the long sixteenth century, with Braudel, to extract the origins of modernity, emphasizing his trend inherent to internationalization, even before the consolidation of the production mode. The modern world-system created at the dawn of modernity gradually extends until, in the 19th century, and it incorporates the entire planet. There is an integration of societies in a transnational network of commercial exchanges, which is developing and improving. Thus, an innovative social system is created, different from other forms of power and domination, which extends in economic, cultural, and political connections around the world (Wallerstein 1974).

The stages of this narrative encompass the interregnum between 1450 and 1640, in which the origins and initial conditions of the world-system are evident, closely linked to the European scenario; they cross modernity, from 1640 to 1815, in which the system had spread around the world; until reaching the third phase, from 1815 to 1917, in which the expansion demands from the system a readjustment to the new reality. From 1917 onwards, the present is constituted in the revolutionary tensions that the systemic consolidation

6 There are centers of thought that currently bear widely the interpretations of the world-system. Noteworthy are the studies by researchers at the Fernand Braudel Center at Binghamton University, in the state of New York, in the United States, at CES (Center for Social Studies), in Portugal, whose greatest disciple was Boaventura de Sousa Santos, and, in Brazil, for example, the Research Group on Political Economy of World Systems (GPEPSM), from the Federal University of Santa Catarina, in Florianópolis, and the Laboratory of Studies on Hegemony and Counter-hegemony (LEHC), from the Federal University of Rio de Janeiro.

provokes. In the exercise of going back to the 15th century and returning to the present, Wallerstein does not shy away from constantly feeding the basis of his ideas, adapting them to contemporary changes, to the point of projecting even the decline of the world-system, which he would already have, even, an approximate date⁷.

Wallerstein's thought, despite having the prominent verve of anti-colonialism, still flirts with Western Marxism⁸, a tradition very influential to the Marxists of his time. In other words, he rejected the two-dimensional idea of structure and superstructure, placing the two plans at the same level and giving the same importance to issues related to economics, politics, ideology, culture, philosophy. Also, as a specific mark of the time in which it lived and forged itself, that of Fordism, industrial capitalism, Keynesianism, and the social welfare model, directed the focus of international relations towards international (and unequal) trade. Along this line, within the modern world-system, the world-economy is projected, which is intensely articulated by geographic areas via capital and commodity flows, whose dynamics impact and, at the same time, are contaminated by the interstate system, shaped by issues diverse, such as politics and culture (Martins 2011).

The interaction of these elements moves the transformations and guarantees the progress of the system, which is not, however, linear, but marked by cycles⁹ that are characterized by the leadership of the hegemonic state. The emphasis on its systemic object is linked to the importance given to competition between European national states, which, according to the author, not only degenerated into political and economic chaos thanks to the command, over the last 500 years, of three great hegemonic powers that would have been able to organize or govern the hierarchical functioning of this order (United Provinces, or what would become a large part of Holland, England, and the United States). The existence of a hegemonic power would be a systemic imposition so that unity does not fall apart in a world empire. In other words, the American intellectual starts from a theoretical perception that flirts with hegemonic stability, from the role of hegemonic power as the guarantor of the system¹⁰.

⁷ This is what Wallerstein (2009) defends in more recent studies and analyzes, pointing to 2050 as a limit and a framework for transformation.

⁸ Losurdo (2018) explains and situates the tradition said to be Western (which is not related to geographical issues) in the beacons of Marxist thought.

⁹ Under the influence of Kondratiev's notorious conceptions, the interregns would be characterized by phases of expansion (phase A) and crisis (phase B), the duration of which would be between 30 and 60 years, and could be repeated within a hegemonic cycle.

¹⁰ Fiori (2004) attributes to Gilpin and Kindleberger, realistic and non-Marxist theorists, the

The Hegemonic power is that which is distinguished by prominence (command, leadership, and influence) in this space, even though it cannot fully control it, due to the particularity of the world-system: it is uncontrollable by a single imperial power within the framework of capitalism. Although the hegemonic power is the promoter and guarantor of order, it is immersed in a highly competitive dynamic between States, the inter-state system, composed of sovereign political entities (Mariutti 2009). This gear is not tight, and there may be mutations between the various layers of the international division, which is configured between the center, the semiperiphery, and the periphery.

From the eclectic synthesis proposed by Wallerstein, it is possible to make some observations pertinent to the scope of the article. Going back so far in history affects the theoretical rigor of Marx's historical and dialectical materialism, as it goes beyond the Industrial and bourgeois revolutions (of the United States and France), which ends up mixing concepts of even similar names, but with different content and specificity (molded in the frameworks of capitalism). The interaction of the world-system between economics (world-economy) and politics (inter-state system), in turn, is interesting, as well as the focus on inter-state competition as a factor of instability and indomitable, that is, it cannot be controlled by any single force based on the dynamics of capitalism. Both perceptions are already closer to Marx.

The world economy is, however, too restricted in the sphere of distribution and circulation of international trade, without further details of the productive sphere, and not being based on the relations of production. Thus, both the economic categories and the policies used by him end up gaining idealistic outlines, vulnerable to leaning more towards abstraction than towards reality. The international division of labor proposed between the tripartite branch center, periphery and semiperiphery is worthwhile, but it often lacks clarity in its definitions. The political changes and agitations of the 1960s (such as the May 1968 uprisings) are, for him, a turning point in the systemic trajectory, having the crisis of the following decade as one of its consequences. This moment bothers him to the point of identifying the emergence of a terminal moment not only of American hegemony but of the entire modern world-system. His heterodox thinking leads him through demography, ecology, and cultural aspects to explain systemic development, which brings him closer to political perspectives.

In this broad focus, the concept of imperialism is diluted, as it happens within the tradition of Western Marxism, becoming one more effect of the systemic mechanisms of reproduction and exploitation of inequality between

adherence to this line of thought that was ironically called the theory of hegemonic stability within the debates of International Political Economy in the 1970s and 1980s.

countries, based on the international division of labor. In his approach, the concept of hegemony would be even more in vogue than that of imperialism, which is diluted and relegated to a second level, to the point that the theme is considered to be the missing element in several moments of the broad systemic approach of the American author (Brewer 1990). There is, therefore, no innovation about imperialism, but rather the connection of the concept to the economic bases. Attributed to the classic thinkers of imperialism, they would be insufficient and outdated and would need updates within the post-war context (and the rise of the left to power). Thus, like the theories of dependency and unequal exchanges, he directs his focus to the disparity between center and periphery, annealing the bases of his thinking in commercial or market relations, which translate, among other mechanisms, into the international division of labor (Noonan 2017).

Arrighi and the World-System

Giovanni Arrighi was, within the theories of the world-system, the main follower and diffuser, contributing decisively to its worldwide capillarity and its improvement. The Italian economist and sociologist was born in 1937, on the outskirts of Milan, and became one of the greatest contemporary intellectuals. He died in 2009. He was part of a generation in the context of the second post-war period, of prosperity and economic recovery at the center of capitalism and struggles and wars on the periphery. It is a context of unequal exchanges and monopolistic control of trade. Like Wallerstein, the Italian ¹¹ synthesized excerpts from the reflections of Marx, Braudel, Weber, and also Schumpeter. In the 1960s, his interest was directed to the study of economic development in peripheral countries from a work trip to Africa (Zimbabwe and Tanzania, specifically). He traveled between Italy and the United States dealing with burning issues on the international stage. From the focus on the periphery, it was extended to the development of capitalism as a system. Thus, he turned to the crisis of American hegemony, the resulting political and economic transformations, and he even pioneered the rise of China (and its surroundings in Asia) as a world power.

In his writings and ideas, he started from Marx but sought to break with classical Marxism. Unlike Wallerstein, he does not understand that the roots of modernity must be sought in the beginnings of feudalism. In this sense, it takes less time to dive into Italian city-states to identify the germs of

¹¹ Callinicos (2009) states that Arrighi cannot be placed in any category, in view of the complexity and temporality of his thinking.

capitalism. In the historical verification that capitalism undertakes as a world system, it dates from the 16th century, originating in Genoese accumulation, and has remained essentially unchanged since then, being relatively static when it touches the terms of center and periphery. Thus, starting from Braudel's concepts of long and short duration, but disagreeing with him on specific issues, he systematizes the history of the world system in cycles, inspired by the Kondratiev waves, which run from the long sixteenth century to the present day, which would be the long 20th century, which is the title of his most renowned work, *The Long 20th Century. Money, power, and the origins of our time* (1994). The timeline is measured by the duration of the processes of capital accumulation led by the hegemonic power of the time.

The sense of hegemony is very dear to Arrighi and, perhaps, the main element of dissent with Wallerstein (regarding the conceptual definition of the term and not about the overlapping of hegemony with imperialism). So much so that he returns directly to Gramsci to apply it to international relations (Arrighi 2007). The author emphasizes its two fundamental aspects: leadership (etymological notion) and domination (derived notion). The leadership would be exercised between States when an entity directs the system towards a path, whose movement is perceived as consonant to the general interest, which reinforces its position of domination and, at the same time, intensifies competition. In other words, there would be consensus and coercion when the power search is not the only objective of the state action of the hegemonic entity. To a large extent, world hegemonies reorganize the system of exchange and accumulation, fostering opportunities for cooperation, that is, also spreading positive effects in general¹². The leading role of the hegemonic power does not make interstate capitalist competition unfeasible, responsible for changes in cycles of economic accumulation and political leadership, which are not coincident spheres but are in constant symbiosis.

For Martins (2011), historical capitalism, in the Italian view, would develop in two distinct and expansive logics, capitalist and territorial, intended for unity and contradiction. They articulate around the interwoven relationship between economics and politics. Thus, the driving force behind this development is the expansion and restructuring of the world economy, initiated by the leadership of States, communities, or blocks of government or business agents. Due to this pendular trend, four systemic accumulation

¹² Here, for Arrighi, the same criticism made by Fiori (2004) against Wallerstein applies, in the sense of pointing to a beneficial notion of hegemony, as a factor of stability. The perception is situated in the time and space of prosperity in the capitalist center from 1945 to 1970, since from the crisis of the American hegemony the hegemonic behavior changed completely, being the biggest factor of systemic instabilities.

cycles are registered: a Genoese (embryonic) cycle, from the 15th to the 17th century; a Batavian cycle, from the 17th to the 18th century; a British cycle, from the 19th century; and an American cycle, from the 20th century; that translate three hegemonic waves, the bathe and the Westphalian arrangement, the British of free trade and the American of the free initiative. Later, in more recent studies, Arrighi (1996) will emphasize only the last three, which are undoubtedly the most consistent, with sparkling distinctions and features in common.

Each stage is characterized by the same phases, starting with material expansion, followed by financial expansion. Amid over-accumulation of capital, decay and crisis begin, the transition from one power to the other takes place. It appears that the cyclic interregnums are increasingly shorter and the hegemonic powers increasingly stronger. Arrighi attaches peculiar importance, compared to Wallerstein, to financialization. The primacy of finance, contrary to what the classical authors of imperialism would say, would not be an exclusive feature of the 19th century, but it would already be present in the relationship between kingdoms around the end of the Middle Ages and the beginning of the Modern. The financial expansion, even, would intensify the capitalist contradictions so much that it would be the turning point in the state dominance of a period, announcing the end of a cycle. Based on this theoretical elaboration, Arrighi, when groping the crisis of the Fordist model in the 1970s, is induced to the common error at the dawn of the 1990s, which was to point to the financialization of the world as a sign of the decline of American hegemony (autumn). Concomitantly, it outlines that Japan would succeed the Americans in the transition of world power, given the Asian accumulation pattern that could supplant the American. Finally, he shifts his attention to China in a book that became a reference for the study of the subject, *Adam Smith in Beijing: Lineages of the Twenty-first Century*, from 2007.

Imperialism was also not at the center of Arrighi's concerns. However, he dedicated a study to systematize the contributions made so far. In the book *The Geometry of Imperialism*, from 1978, the author takes on the task of organizing the pioneering notions, with Hobson as a major paradigm, and comparing them with the existing formulations, in what he will call the second cycle of imperialism, of the decades of 1950 and 1960. Imperialism, for Arrighi (1983), would not be the panorama of anarchy in interstate relations that emerges from the competition between central states for territories, but the hierarchical order of states and the consequent specific domination structure that characterizes the economy-capitalist world since World War II. Faithful to its theoretical conceptions, it does not escape historicity and

hegemonic cycles. Thus, there would be several phases of imperialism in a hegemonic cycle. He tries to illustrate these periodizations by geometric figures, tracing identities, and disparities. In other words, imperialism was still eclipsed by other priority issues and very much tied to its economic side.

Despite significant differences, Arrighi is closer than he is distant to Wallerstein (especially about the concept of imperialism) and shares both the epistemological limits¹³ and the great merit of the world-system theories. They call attention to the analysis of the inequality of international economic relations through a systemic, holistic, and historical view. Its breadth and heterodoxy allow for fruitful dialogue as other perspectives, with those of dependency authors, such as Frank and Dos Santos, more specifically, and, above all, with Amin's eclecticism (and unequal international trade).

Amin and the Unequal Exchanges

Samir Amin was a political economist and one of the greatest exponents of third worldism¹⁴ and anti-colonialism. He was born in Cairo, in 1931, in Egypt, but studied and worked in France and many Francophone countries in Africa, such as Senegal, Mali, and Algeria, in political, economic (development), and academic institutions. He died in 2018. He was not a direct successor to the world-system theories, in the line of Wallerstein and Arrighi, but he is at the same level of importance and relevance exercised in Marxist internationalist studies. Its conception, also eclectic, touches on the theoretical understanding of the world-system, which can be inscribed in this tradition, but also with other aspects, such as dependency¹⁵, even more closely as occurs with unequal international trade. Communist and anti-fascist since he was young, in France, he joined the French Communist Party and gradually moved away from the Soviet model and towards Maoism. He lived closely and

13 In this sense, it is worth mentioning the main questionable points of the world-system theories, which are directed towards their functionalist bias, their detachment from Marxian premises and the extended notion of historicity of capitalism. For more, see Gerstenberg (2010).

14 The concept is debatable and may have a broad approach, involving all those who discuss underdevelopment in peripheral regions (dependency theorists, the world-system and unequal exchanges), or a restricted focus, touching only the intellectuals living in the large centers they directed their attention to the periphery, like those of unequal exchanges. Most of the literature, of Anglo-Saxon origin, tends to prioritize the more general perspective. For more, see Callinicos (2009); Brewer (1990); Barone (1985); Carnoy (1994).

15 Amin extols aspects of the center's expropriation dynamics in relation to the periphery, citing overexploitation of the workforce, which would allow it to be inscribed in Marxist theories of dependency (Brewer 1990, Côrrea 2012).

engaged in the movement of non-aligned countries and actively valued the independence and development of peripheral countries.

Immersed in his time and with the lens turned to the global periphery, his central concern was economic development at a global level. Immediately, as with the Eclacian¹⁶ theories¹⁷, he identified the gaps in the theories of modernization of the center, aimed at stepping up the scale of economic progress. He quickly went further, understanding underdevelopment as the reverse side of development. Based on the synthesis between the law of value (and its economic categories) and historical materialism (with an emphasis on class struggle), he formulated a law of world value to explain that peripheral countries would have their growth possibilities restricted and blocked by central economies which used the mechanism of overexploitation of peripheral labor. Historical materialism would even have urgency over the law of value, modulating it and moving world transformations, that is, attributing central importance to political phenomena. Therefore, capitalist development would need to be analyzed in its entirety, at the global level, but the strategies of autonomy and growth of underdeveloped countries should be separated from this whole, escaping the structural limits imposed. It combines the emphasis on asymmetry in the relations between center and periphery with class analysis, explaining the difficulty of Third World leaders in resisting imperialism, getting closer to Lenin (Noonan 2017).

Starting from the ideas of Marx, Braudel, and Polanyi, the author mixed his view with the most outstanding post-war interpretations of capitalism, development, and periphery, such as that of the monopoly capital of Baran and Sweezy, in the theory that would become known as monopoly capital¹⁸.

¹⁶ Translated from the United Nations Economic Commission for Latin America.

¹⁷ Cephaline theses are those that arose around CEPAL (Economic Commission for Latin America and the Caribbean), an organ created within the United Nations (UN), linked to the Economic and Social Development Council (ECOSOC), focused on criticizing the perspective universalist development radiated by the traditional canons (Lewis, Nurkse, Rostow and Rosenstein-Rodan) of the center on the issue. In these visions, in clear contrast to the Ricardian theses of specialization of the countries via comparative advantages, it explains the backwardness of the peripheral countries from the concept of unequal development, emphasizing the peripheral asymmetries, of primary-exporting locations in relation to the industrialized center, which would lead to the permanent deterioration of the means of exchange, the imbalance of the balance of payments and unemployment. The solution presented would be the substitution of imports by the constant action of the State as a promoter of national development, stimulating local industries, the domestic market, the distribution of income, the incorporation of technology and the progressive modification of the export basket.

¹⁸ The school of monopoly capital, basically formed by its founders, Paul Baran and Paul Sweezy, despite sparse and indirect contributions, was a first manifestation of the continuation of Marxist reflections on imperialism and, concomitantly, of updating the ideas of the pioneers,

This means recognizing the tendency of capitalism to overaccumulation and the consequent problems with absorbing the surplus. Stagnation would be the rule in this scenario, which could only be fought with production centered on the State. Thus, late post-war capitalism met very peculiar conditions and, therefore, was an exception, and with the crisis of the 1970s and 1980s, the focus shifted from the state to financialization as a driving force out of stagnation. In its periodization, from the end of the 19th century until 1971, it was the era of traditional monopoly capital and thereafter a financial oligopolistic capitalism emerged and impacted international relations today.

Unlike Wallerstein and Arrighi, Amin nominally even dedicates many writings to thinking about imperialism. As a result, the first edition of *Imperialism and International Trade (the unequal exchange)*¹⁹ was made public in 1971. The direction of this bias is directed by the inequality of capitalist relations, as an emphasis on trade. It is assumed that the value goes from the periphery to the center, being appropriate by it, as well as all the consequences of this, such as the selective migration of labor. And monopolies are intensifying, with control in several fields, from technology, finance, and natural resources. In underdeveloped countries, the goods produced were exchanged for a lesser amount of value than that actually contained in them, whereas in developed countries the opposite would occur. The dynamics of accumulation does not, however, allow this universe to be divided between homogeneous entities, on the contrary, because it tends towards asymmetric development, it fosters disparate socio economic formations, containing different manifestations of the mode of production. The main cleavage is that which occurs in two categories: center and periphery. In the center, growth is autonomous, while in the periphery it is blocked, due to the competition of the great powers. The unequal specialization resulting from this dynamic is determined by the absolute costs of production (and not by comparative advantages), which depend on productivity and wages. Therefore, those

in post-World War II, inserting the element of the periphery. From academic publications to short-term insertions in the Monthly Review, the two intellectuals spread their interpretations around the world. For all the political engagement that the magazine particularized, it managed to bring together a body of intellectuals, which became known as the Monthly Review group, which was marked by a very peculiar vision in this Fordist debate and which was subsequently renewed over the years.

19 The work brought together specialized articles from the main exponents of this reading, such as Arghiri Emmanuel, Samir Amin, Charles Bettelheim and Christian Palloix. The reasons for the evident asymmetries were at the heart of the differences between them, residing in the value of the workforce (wages), for Emmanuel; in the class struggle, materialized in the overexploitation of work in the periphery by the center, for Amin; in the organic composition of capital and in regional disparities, for Bettelheim; and the exploitation rate contained in the essence of political economy, for Palloix.

nations that industrialized earlier have an immense advantage over laggards. Thus, the uneven development arising from this panorama is anchored in the sphere of circulation, translated into asymmetric exchange relations.

Unequal exchanges are inserted in this larger scope, which is modulating itself according to the transformations but has its roots in imperialism and uneven development. On the subject, Amin wrote works on the crisis of imperialism and uneven development, still in the 1970s. For him, imperialism organizes, under the domination of monopoly capitals, an immense pyramid of forms of labor exploitation, in which different levels all participate the bourgeoisies and the exploited classes of the world system, strategically located in the field of capitalism. It emphasizes the exploitation, in its various forms, of the proletarians both in the center and in the periphery, all integrated into the imperialist system. As a result, there is a need for the unification for the uprising towards socialism. To paraphrase Lenin, he states that not only the proletarians of the world but also the oppressed peoples should unite (Amin 1977a).

In his ambitious and long-lived effort (he has written on the subject since the 1950s), he seeks to explain the expansion of capitalism around the world and, simultaneously, the impact of this spread in the various regions, as a synthesis of the main Marxist premises underway at the time. Later, over time, he refines his understanding²⁰. Thus, it is based on his law of world value that he withdraws the concept of imperialism. Relating it directly to the capitalist mode of production, it would be the binding element between the mechanisms and laws for the reproduction of capital; the social, national, and international alliances that support them; and the political strategies employed by these alliances. Accompanying the link to capitalism, he seeks the historical reasons for this dynamic in Eurocentrism, which refers to the analysis of colonization in the Modern Age. Imperialism, following the transformations of monopoly capital in the 19th century, consolidated segregation in a world-wide scheme between center and periphery.

The combination of economic issues, still closely linked to the concept of imperialism, with policies, directing the lens to class struggle on a world scale is his great contribution. His expanded theoretical starting point, the world-system, does not prevent him from analyzing national particularities, especially in the periphery (of Africa and Asia, more closely) in which the sparks of possible ruptures with the systemic dynamics would reside. The combativeness and restlessness made Amin one of the few theorists to resist over time, spanning generations, as one of the main critics of capitalism.

²⁰ Amin 2005; 2006.

Final Remarks

As ephemeral as it may seem, having lasted approximately a quarter of a century, the Fordist debate cannot be overlooked, since it characterizes an important transition period for the horizons that appeared in the later context. As can be seen, the analysis of imperialism was broadened and, at the same time, diluted, in arguments that included it in the relief of issues more similar to the unequal relations between center and periphery in the world development of capitalist relations. What is important to point out is that, in spite of the substantial geopolitical changes carried out, with regard to theory, there was no complete break with the pioneers, configuring the Fordist interregnum much more as a complement to the first Marxist ideas of imperialism (a direct link between imperialism and its economic basis), but with crucial innovations. Founded on primary bases, the authors of that moment did not themselves reevaluate the phenomenon of imperialism, but sought to understand it from broader perspectives that considered the emphasis on mechanisms that involved, to a greater or lesser extent, international trade or the sphere of circulation, economic surplus, value transfer, the world system and unequal exchanges.

The common point of the two interpretations analyzed (world-system and unequal exchanges) is to take capitalism as a world system, with an uneven trend between the parties involved. Contrary to what the pioneers thought, the expansion of capitalism did not lead to its reversal, due to its inherent contradictions, but, rather, to its consolidation as a mode of world production. What should be closed has been enlarged. Capitalism managed to build a world market, which the relations of production are expressing, however, increasingly distorted, feeding an extremely incongruous dynamic. The backwardness of the dependent countries needs to be taken seriously in analysis, inserting it into its space, in the international system. It is the failure of capitalism to generate widespread prosperity and development that brings about the imperious nature of change. The unit of analysis is not national social formation and class correlation, but the world system, as a whole, having distinct geographical areas, and the States and classes of this whole being parts.

Although the eclecticism of the authors does not allow us to place them in the same square, and leaves them vulnerable to criticism in several aspects, reviewing the three contributions is fundamental for the deepening of studies on imperialism. What unifies them is that they think in a context in which capitalism reaches the fringes of the globe, that is, the periphery emerges, with the fraying of social tissues through the introduction of capitalist production

relations, beyond Europe and points in the North hemisphere. Therefore, the moment in the development of capitalism, Fordism, directly impacts their theoretical and political formulation. Each in their own way, Wallerstein as the notion of system, Arrighi with historicity for hegemony and Amin for the emphasis on inequality and class struggle, they strengthen the debate, bringing interpretations about the asymmetries of the center and periphery relations that serve as leaven. from critical conceptions, projecting on a long-standing and militant career of main references for criticizing capitalism (and financial globalization) until today.

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ABSTRACT

Imperialism takes on a new guise after the Second World War. In a panorama of expanding production relations, capitalism becomes, in fact, a mode of world production, based on Fordism. In this dynamic, new elements are incorporated into the analysis of international relations, such as the periphery, unequal exchanges, the transfer of value, and the world system, which end up not only eclipsing imperialism but also giving it other outlines. In this tone, it is necessary to investigate three influential authors, such as Wallerstein, Arrighi, and Amin, demonstrating their place and their limits in the central debate of international relations. Over time, the three, due to the vigor of their ideas and political engagement, became essential authors for criticizing the moment of capitalism in which we are inserted, even if it is to refute them. Studying it means unraveling yet another important knot in the task of investigating imperialism, an essential concept for understanding reality.

KEYWORDS

Imperialism; Capitalism; International Relations.

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