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# Janus-Faced Liberalism: Race and the Modern World-System

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Sociology

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School of the Social and Political Sciences

University of Glasgow

## AUTHORS DECLARATION

I declare that, except where explicit reference is made to the contribution of others, this dissertation is the result of my own work and has not been submitted for any other degree at the University of Glasgow or any other institution.

Printed Name: Chase Beecroft

Signed Name

## Abstract

This thesis examines the Janus-faced nature of liberal democracy through a race-critical reconstruction of the modern world-system. It begins from the observation that the universalist claims of Western liberal political order, grounded in equality, rationality, and political inclusion, have persistently coexisted with structured forms of racial exclusion, domination, and hierarchy. Rather than treating this coexistence as a contradiction to be resolved, or as a failure to realise an otherwise coherent normative ideal, the thesis approaches it as constitutive of liberal political modernity itself. The central argument is that race is not external to liberal democracy, nor a contingent distortion of its universalist commitments, but a foundational logic through which those commitments have been historically organised, extended, and withheld.

To account for the durability and global scope of this configuration, the analysis situates liberal democracy within the *longue durée* of the modern world-system, drawing on and critically engaging Immanuel Wallerstein's world-systems analysis. While this framework provides a macro-historical account of structural inequality and the emergence of liberal geoculture, it is shown to reach its limits in theorising race beyond its economic determination. In response, the thesis develops a race-critical elaboration of the world-system by foregrounding the epistemic, political, and material dimensions through which racial hierarchy is produced and reproduced. Drawing on a cultural political economy approach, and informed by the work of Stuart Hall, race is treated as a materially effective and historically durable relation that operates across, and articulates, the economic, political, and cultural pillars of the system without being reducible to any single domain.

The thesis proceeds in three parts. Part I reconstructs the foundations of the modern world-system, demonstrating how race appears within world-systems analysis as a dispersed but insufficiently theorised component of European universalism, the division of labour, and the construction of political subjecthood. Part II subjects this account to a sustained race-critical interrogation, arguing that the economic-centred orientation of world-systems analysis imposes a temporal and conceptual foreclosure on the theorisation of race. In doing so, it establishes that race is embedded within the structures of knowledge that define the human, the political, and the social prior to their institutional codification. Particular attention is given to the figure of the liberal Citizen, the epistemic construction of Man, and the material organisation of space as sites through which racial hierarchy is rendered intelligible, legitimate, and empirically self-evident. Part III advances a theoretical integration, incorporating heterarchy, the coloniality of power, and the Racial Contract to construct a race-critical world-system in which race is established as a foundational logic operating across all dimensions of the system simultaneously.

In advancing this argument, the thesis demonstrates that the apparent contradictions of liberal democracy are not contradictions in the strict sense but follow from the ways in which racial hierarchy is constitutive of the modern world-system and embedded within liberal political order. The universalist claims of liberalism, and the exclusions that accompany them, are produced together through the mediating role of liberal geoculture and the structures of knowledge through which it is sustained. The persistence and contemporary intensification of these dynamics, evident in the resurgence of racialised exclusion within liberal democracies, are therefore understood not as departures from liberal political modernity but as expressions of its underlying structure.

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## 1. Introduction: A History of Contradictions

Western modernity is riddled with contradictions that have fundamentally shaped, and continue to reshape, societies on a global level (Bauman 1991; Habermas 1987; Giddens 1990). From the 15th century and expanding to our present day, there have been unrealized promises and devastating consequences. The Age of Discovery promised new lands for exploration, trade, and cultural exchange. Yet, upon discovery of the New World in 1492, the native populations were dominated, exploited, enslaved, and exterminated (Nash 1974). The heart of the Italian Renaissance in the 15th century gave birth to Man outside of theology, renewed an interest in classical history, and promoted higher education. However, it was also a period in which non-Europeans were subjected to definitions that declared their inhumanity or sub-humanism (Wynter 2003). The Age of Enlightenment promised individual authority, where one's own moral and rational capacities could lead to freedom and progress for a good and just society (Habermas 1987). However, colonialism, imperialism, and slavery were in full effect. Consequently, the very ideals promised of human emancipation fell flat for a majority of the world's colonized and enslaved populations (Goldberg 1993). By the mid-19th century and the Age of Progress, there was hope to be found in the emancipation of slavery and a decolonization process beginning (Henry 2020; Webster 2021). However, this Age swiftly vanished in the mid-20th century when two world wars waged with technologies of pure violence decimated entire communities and geographic locations all for the sake of 'progress' and 'racial purity' (Bauman 1991; Alexander 2013). In fact, the 20th century proved to be the deadliest in history, with well over 30 different wars or genocides, with the most notorious being that of the Final Solution in the Holocaust (Rosenberg 2020; Bauman 1991).

In response to this long history of social evils, theorists have continued the tradition grounded in the emancipatory ideals of Enlightenment philosophy: the pursuit of a political ideology capable of overcoming social exclusion, oppression, enslavement, and outright mass murder (Graeber 2005; Alexander 2013; Goldberg 1993; Bauman 1990; 1991). The most hopeful political ideology to emerge from this tradition is that of liberal democracy (Mann 2012; Alexander 2013). "Democratic Peace Schools" and one of the main representatives, Rudolph Rummel (1994), have declared democracies as "essentially pacific, rarely fighting wars, and almost never against each other", actively engaging in practices of social inclusion as opposed to exclusion (cited in Mann 2012: 19). The more authoritarian a state, Rummel argues, the more likely it is to commit genocide; democracies, by contrast, commit virtually no genocides nor ethnic cleansings (Mann 2012: 19-20).

However, there is substantial historical and empirical evidence to the contrary. Mann (2012: 20) contends that Rummel's own statistical analysis overlooked the democratically approved fire-bombing of Dresden and Tokyo, the American dropping of atomic bombs in Hiroshima and Nagasaki, the napalming of Cambodia and the Vietnamese countryside, and the ethnic cleansing and genocide of Native American nations across North America. Furthermore, multiple Native American nations, including the Cherokee, Choctaw, and Creeks, had implemented democratic political structures at the urging of the United States since 1827. Every act of violence against those nations thereafter is therefore, in Rummel's own framework, democratic-on-democratic violence and genocide (Mann 2012: 26-27). Beyond such an external account, the agencies of oppression are not simply confined between warring nations but can be turned inward. Within the democratic United States, the Black American populace was subjected to slavery, Jim Crow, the New Jim Crow, and ongoing consequences of structural racism (Alexander 2010). The sum of these external and internal patterns highlights that democracy, as a political ideology, *has the potential to actualize the very same evils it is claimed to stand against* (Mann 2012).

What makes this contradiction so analytically pertinent is that liberal democracy is not simply a political system that may have fallen short of its ideals, but a political form organized around a specific and powerful universalist promise: that all persons, by virtue of their rational capacity and equal humanity, are entitled to political standing, civic protection, and inalienable rights to life, liberty, and the pursuit of happiness (Locke, 1690; Jefferson, 1776; Mills, 1997; Losurdo, 2011; Hanchard, 2018; Goldberg, 1993). Yet, such ideals seem to fail the historically colonized, enslaved, economically disenfranchised, and racialised populations who come to stand as a living antithesis of Western ideals.

This tension between universalist promises and structural exclusions is not a discovery of the present but has been articulated in various ways since at least the mid-19<sup>th</sup> century. For example, Martin Delany (1852: 14) has documented what he witnessed across the West:

“That there have been in all ages and in all countries, in every quarter of the habitable globe, especially among those nations laying the greatest claim to civilization and enlightenment, classes of people who have been deprived of equal privileges, political, and religious and social cannot be denied [...] there have in all ages, in almost every nation, existed a nation within a nation – a people who although forming a part of the population, yet were from force of circumstance, known by the peculiar position they occupied, forming in fact, by the deprivation of political equality with others”.

Delany was not necessarily describing an exception to the liberal democratic promise, but its structure. That is, the universalist claims of the most enlightened nations and the systematic deprivation of those within them are not contradictory, but constitutively paired. Drawing from Delany, Michael Hanchard's (2018: 64) comparative study of democracy from classical Athens through the modern metropole, concludes that, "the racial and ethno-national regimes inherent not only in colonialism, but in the politics of the metropole, were not anomalous to political modernity, but one of political modernity's constitutive components". The coexistence of universalist proclamation and racial exclusion is not a failure of the tradition; it is foundational to its tradition.

What holds this history together, from the violence of colonial conquest through the Holocaust to the racial politics of the present, is not simply a succession of failures to realise modernity's ideals. It is a continuous thread: race. In each of the cases surveyed above, racial ideologies are not incidental to the violence in question but one of its constitutive conditions. The native populations exterminated in the Americas were rendered extinguishable through racial classification (Nash 1962; Wynter 2003). The enslaved populations moved across the Atlantic were rendered exploitable through racial hierarchy (Robinson 1983). The Jewish populations of Europe were rendered disposable through the racial science of the 20th century (Bauman 1991). The racialised populations of contemporary liberal democracies are rendered excludable through the racial ordering of citizenship, belonging, and political capacity (Mills 1997; Alexander 2010). In other words, liberalism is Janus-faced. To understand the contradictions of liberal democracy adequately is, therefore, to understand the role of race not as a distortion of its universalist promises but as a foundational logic through which those promises have always been organised, extended, and withheld.

In Roman mythology, Janus is the god of beginnings, transitions, and duality. He was depicted with two faces, each looking in opposite directions simultaneously, embodying the capacity to attend to what lies behind and what lies ahead as dimensions of a single, unified figure. It is from this image that the concept of the Janus-faced nature derives its analytical form: not a contradiction between two opposing tendencies, but a single arrangement whose emancipatory proclamations and exclusionary practices are constitutive of one another (Alexander 2013). This project is neither the first nor will it be the last to describe liberal democracy and its legacies as Janus-faced. The metaphor has been used widely across critical discourses to capture the constitutive ambivalence at the heart of modern society, from Tom Nairn's (1977) account of nationalism, to Homi Bhabha's (1994) theorisation of colonial ambivalence, and Jeffrey Alexander's (2013) claim that modernity is constitutively Janus-faced. This project mobilises the concept in a

specific direction, placing race at the very centre of the Janus-faced nature of liberal democracy in order to understand how its universalist promises and continual exclusions are simultaneously constituted. It is race that determines which face of the liberal democratic order different populations encounter, which universalist promises are extended to them, and which mechanisms of exclusion circumscribe their political belonging.

The persistence of this logic into the present is what gives the argument its contemporary urgency. Since the Great Recession of 2008/9, the era that Alison Ayers (2023: 1) identifies as witnessing "the rise and increased sway of numerous authoritarian-right movements, regimes and leaders across the globe," the contradictions that Delany named in 1852 have become increasingly difficult to contain. Racial violence has been increasing in democratic countries such as, but not limited to, the United States, the United Kingdom, France, Germany, the Netherlands, Spain, and Italy (Eduardo Bonilla-Silva 2000; Federico Finchelstein 2019). The Hope Not Hate (2023) report concluded that within the United Kingdom there is an increase in growing anger, far-right groups are becoming increasingly vocal, and 2022 recorded the highest number of far-right terrorist activities and arrests in the country's recorded history. Hope Not Hate (2024) has since identified 2023 as marking the blossoming of the Radical Right. Such normalisation is equally troubling within the United States. Trumpism and the Make America Great Again Republican Party have placed far-right politics into the mainstream discourse, and the return of Donald Trump to the American presidency in 2025 has set the foundations for far-right policies becoming institutionalised. Donald Trump, in his own words, has accused migrants and immigrants of "poisoning the blood of our country" whilst claiming there is an "invasion" from the southern border (Lind 2015; Arnsdorf, Miroff & Dawsey 2024). At the present global conjuncture, these far-right resurgences are not simply isolated matters of political or economic discontent but share a fundamental racial underpinning that shapes their ideologies, mobilises their supporters, and justifies their policies. Across different national contexts, racialised fears directed at immigrants, minority religious groups, or people of colour function as both a unifying rhetoric and a mechanism of exclusion, illustrating how race remains a fundamental logic through which the boundaries of belonging are drawn and the promises of liberal democracy are withheld.

Yet, these developments are not a departure from the liberal democratic tradition whose universalist credentials have simply come under strain. They are, as the analysis developed throughout this project shall show, the most transparent expression of what has been obscured. To understand why these contradictions persist, intensify, and prove resistant to the very reform and inclusion that liberal democracy offers as their remedy, it is necessary to examine the foundations from which they were first constituted. As such, this project

approaches the Janus-faced nature of liberal democracy from a race-critical perspective, treating race and racism not as a distortion of its universalist ideals but as the foundational logic through which those normative ideals and their continual exclusions have always been simultaneously organised and sustained.

## 2. Methodological Orientation, Reflexivity, Research Questions, and Project Outline.

### 2.1 Methodological Orientation.

The intention of this project is to further our understanding of the Janus-faced nature of liberal democracies within the West through a race-critical perspective. Liberal democracy is approached neither as a normative project that has failed to realise its emancipatory potentials, nor as a political tradition distorted by contingent historical forces. Instead, it is treated as a historically embedded political form whose emancipatory and exclusionary dimensions are produced together. This formulation does not presume an original liberal ideal from which a political reality departs but takes the coexistence of universal political claims and structured exclusions as a constitutive feature of modern political ideologies. As such, the task of this thesis is explanatory as opposed to evaluative.

Furthermore, approaching liberalism in this way requires an analytical orientation that is attentive to historical production as opposed to normative coherence. Historically, Western liberal political orders have articulated claims to universality, equality, and political inclusion through categories which present themselves as neutral and general while simultaneously operating within social relations that remain marked by racial hierarchy, exclusion, and inequality. This project is concerned with how these dimensions have been historically connected and stabilised, rather than with assessing the consistency of liberal ideals in abstraction from their conditions of emergence and possibility. As such, liberal democracy is treated as an object of sociological analysis rather than a political doctrine to be defended or outright rejected. In doing so, this project is focused on directing attention to the processes through which political universality acquires authority.

The durability of this political configuration is central to this project. Liberal democratic orders have consistently aligned universal political rhetoric with persistent forms of inequality across different historical contexts and periods. This alignment is not treated as accidental, episodic, or reduced to some form of institutional malfunction. Rather, its persistence from its inception suggests that it cannot be adequately explained through a confined analysis of short-term political developments or nationally bounded trajectories alone. Instead, it requires an analysis capable of accounting for long-term historical conditions under which liberal universalism has been rendered socially operative while remaining compatible with enduring forms of exclusion.

The analytical orientation of this project is explicitly race-critical. Fundamentally, race is not introduced as simply an identity category, a demographic variable, or a thematic supplement to an otherwise incomplete account of liberal democracy. Instead, race is treated as a structuring relation of power that shapes political subjecthood, legitimacy, and hierarchy. In this sense, racialisation operates across political, economic, cultural, and

epistemic domains rather than confined within a single domain. Furthermore, race and racialisation frequently precede formal institutionalisation, shaping political capacity and belonging long before becoming codified in law or policy. Such an orientation directs attention to how liberal categories of inclusion, neutrality, and universality have been historically constituted through racial differentiation, rendering race internal to the contradictions of liberal democracy rather than external to it (Mills 1997; Balibar 2004).

This project is theory driven and situated within critical sociology, while certainly informed by race-critical theory. Again, the object of analysis is not abstract political philosophy, but historically produced social formations in which political ideas, institutions, and hierarchies take shape together. As such, political discourse is approached in relation to the historical conditions through which they acquire coherence and authority. In this sense, and drawing from Michel Foucault (1972; 1980) and Stuart Hall (1996; 1997), discourse is understood as historically produced frameworks of knowledge and practice through which objects, subjects, and political distinctions become intelligible and authoritative. Discursive formations, therefore, shape the conditions under which categories emerge, acquire coherence, and organise social relations.

The historical persistence of the problem addressed by this project has a direct impact on the scale and method of research. The Janus-faced nature of liberal democracy cannot be fully understood within a purely national or institutionally bounded framework. Its reproduction over time points towards historical conditions that exceed the boundaries of individual states and political regimes. As such, this project approaches liberal democracy as embedded within broader historical structures rather than as a self-contained political system, establishing the need for a macro-historical framework attentive to long-term patterns of power, inequality, and crisis. For the same reasons, neoliberalism is not treated as the object of analysis. Neoliberalism is understood here as a historically specific form of liberalism, one that inherits and presupposes rather than resolves the foundational contradictions this project is concerned with examining at their deeper historical roots. Consequently, the analysis operates at a higher level of abstraction and temporal scope than that of neoliberalism, tracing the contradictions of liberal democracy to conditions that precede and exceed any singular conjuncture.

World-systems analysis (W-SA), most closely associated with the work of Immanuel Wallerstein (2004a), provides precisely this macro-historical terrain through which liberal democracy can be situated within the *longue durée* of the modern world-system. W-SA insistence that modern political forms cannot be fully understood within nationally bounded units of analysis allows liberal democracy within the West to be critically analysed as structurally embedded within global relations of inequality. At the same time,

this project intends to push W-SA economically focused strengths into the background in order to challenge its conceptual limits (Agnew 2021). While the framework is particularly strong in accounting for long-term patterns of structural inequality, political organisation, systemic crises, and cultural hegemony (Wallerstein 1996), it is traditionally less well equipped for race-critical approaches (Grosfoguel 2004; 2007; Castro-Gómez 2023; Quijano, 2000). However, this does not imply that the framework cannot be held to account for such a focus, but that it requires further theoretical expansion to achieve it.

While race does appear within W-SA (Wallerstein & Balibar 1991), it is often done so in analytically uneven ways, addressed across different domains without full being stabilized as a constitutive and foundational organizing relation as a whole. Rather than rejecting W-SA, this project treats its strengths as the condition for exposing its weaknesses. The structural account of crisis, liberal geoculture, and long-term understanding of inequality provides the necessary backdrop against which the racialised and cultural dimensions of liberal democracy can be brought into sharper focus. In this sense, W-SA supplies the structural and materialist terrain, while more racially sensitive and cultural grounded theoretical resources will be brought into focus to challenge and provide further depth in W-SA weak points.

The analytical orientation of this project is further informed by a cultural political economy approach. Cultural political economy is understood for this project as a post-Marxian evolution in the spirit of the Gramscian tradition, one that retains the materialist terrain of structural analysis whilst insisting that economic, political, and cultural formations are historically related without any single dimension necessary or predetermined primacy over the others (Gramsci, 1971; Hall, 1996). Crucially, rather than departing from the world-systems framework, this orientation works from within it, pressing against the explanatory limits that the economically focused framework imposes on the theorisation of race (Hall, 1980). The theoretical resources in which this cultural political economy is grounded are drawn primarily from the work of Stuart Hall (1996; 1980), and specifically from the manner in which Hall approaches race as a formation that cannot be adequately theorised with purely economic terms or approaches. As such, Hall's synthesis of not only Gramscian currents but also Althusserian, provides the conceptual architecture for the analysis that follows.

From Gramsci, Hall draws a sustained critique of economism, insisting that economic, political, and cultural dimensions of racial formations do not correspond to each other in a necessary or predetermined way, and that hegemony is constructed and contested across cultural, moral, and epistemic terrain in ways that cannot be derived from economic relations alone (Gramsci, 1971; Hall, 1996). This insistence allows the W-SA conceptions

of centrist liberal geoculture and the structures to be treated as productive social and discursive formations through which racial hierarchies are actively organized, rendered intelligible, and legitimated across the world-system. From Louis Althusser, Hall inherits and focuses the concept of articulation on race, which holds that instances through which construct racial and social formations stand in no relation of necessary correspondence or expressive homology to one another, but are historically joined into complex unities structured in dominance that remain open to articulation, rearticulation, and disarticulation under changing historical conditions (Althusser, 2001; Hall, 1980). Together, these inheritances allow race to be understood as a materially effective and historically durable whilst remaining irreducible to class position or economic function, and supply the conceptual grammar through which race can be traced across the economic, political, and cultural pillars of the modern world-system without collapsing such analysis into a single determining logic.

The orientation carries direct epistemic consequences for this project. The Janus-faced nature of liberalism cannot be adequately accounted for through economic institutions or economically focused analysis alone. Rather, the categories through which political belonging has been historically organised acquire authority through the cultural and discursive formations of the centrist liberal geoculture and the structures of knowledge which stabilize the world-system (Wallerstein, 1991a; 2006; Hall, 1996). As such, these discursive formations play a constitutive role in rendering racial hierarchy intelligible and legitimate rather than simply reflecting underlying material conditions. The cultural political economy orientation adopted here treats these formations as productive rather than epiphenomenal. Furthermore, it is this treatment that directs this project towards the cultural, epistemic, and discursive dimensions of racial hierarchy as the primary objects of analysis. Understanding how the universalists claims of liberal political discourse have been historically constituted though and alongside racial exclusions requires a sustained attention to the structures of knowledge and the geoculture of the world-system through which those claims acquire authority, are racially organised, and are reproduced across the world-system. As a consequence, the focus of the project is directed toward the race-critical, cultural, and epistemic dimensions of racial hierarchy which W-SA leave undertheorized.

The methods of analysis employed in this project are race-critical in orientation, combining immanent and ideological critique as jointly operative modes of inquiry. Liberal political ideology is examined immanently, with its universalist claims taken seriously and analysed in relation to the racialised exclusions they historically produce, such that race functions as a fundamental point of contradiction within liberal democracy rather than as

external to it (Balibar, 2015; 2016; Mills 1997). This immanent critique is inseparable from the ideological critique directed at the liberal geoculture and accompanying structures of knowledge through which those contradictions are organised, normalised, and rendered intelligible across the world-system. The two modes of inquiry are not collapsed into one another but are held in a productive tension, since it is precisely through their combination that the Janus-faced nature of liberalism becomes fully visible as both an internal contradiction and an epistemically sustained formation.

Finally, there are three original contributions within this project. First, an original reading of Wallerstein on the role of race within world-systems analysis. Second, an extended and deepened critique on the relationship between race and Western liberalism. Third, a refined race-critical world-systems framework that forwards a non-reductive account of race.

## 2.2. Positionality and Reflexivity

A project concerned with the structures of knowledge through which global inequality has been historically produced, legitimated, and sustained cannot proceed without recognising that I am not external to the problem under analysis. This project does not approach the pursuit and construction knowledge as a neutral or disembodied enterprise but as a historically situated practice, produced from within and in relation to the very same structures of power it seeks to analyse. This is not merely an epistemological claim about knowledge in general; it applies with equal force to the pursuit of knowledge carried out in this project. I conduct this project as a White American man, positioned within Western academia, trained in Western institutional traditions, and focused on the very same epistemic formations those institutions have historically produced, legitimated, and disseminated. To proceed while treating my own position within those structures as self-evident or inconsequential would be to reproduce, at the level of the research, precisely the unmarked universality that this project subjects to critique. Positionality and reflexivity are, therefore, not methodological formalities, nor performances of humility, but obligations internal to the projects own epistemological commitments.

Drawing on Donna Haraway's (1988) work on situated knowledges, all knowledge is produced from a particular location, and the claim to objectivity has historically functioned as an ideological concealment of that location rather than its transcendence. Traditionally, knowledge produced from within dominant institutions and traditions does not typically present itself as historically situated or produced; it presents itself as universal, as the view from reason itself rather than the view from a particular place, time, and set of social relations. It is this naturalisation of a specific location as no location at all that is a

fundamental problem, a specific and historically produced position that comes to present itself as though it were a ‘view from everywhere and nowhere simultaneously’, or as Haraway describes it, the “god trick [of] seeing everything from nowhere” (581). My location is shaped by those same dominant institutions and traditions, and the analytical frameworks I mobilise throughout, however critically deployed, in many ways have been produced within them or in relation to them (Grosfoguel 2007; Castro-Gómez 2003). Haraway (1988: 584) is clear in that acknowledging one’s own position does not resolve it, nor does proximity to or distance from power structures function as a guarantee of epistemic authority. What situated knowledge demands is accountability for where one stands, and part of that accountability involves naming the intellectual formations through which my own analytical sensibility has been produced.

Academically, that sensibility has been shaped most directly with my prior training in analytical philosophy and psychology. A background in philosophy contributed a sustained attentiveness to epistemological foundations and the conditions under which claims to knowledge acquire authority, which bears directly on a project concerned with how these conditions have been historically racialised. Equally, psychology has instilled a concern for subjectivity, meaning making, and lived experience that I have challenged myself to carry into sociological analysis. Specifically, a concern not to lose sight of the individual, or more appropriately, the Subject, within macro-structural accounts of power and inequality. This is a genuine methodological commitment rather than a disciplinary residue. The historical scale at which this project operates risks abstracting away precisely the humanistic dimensions that give racial domination its force and its consequences. These are not incidental bibliographic details but are influential in the particular analytical focus and inclinations operative within this project. They are named here as part of the accountability that situated knowledge requires.

### 2.3 Research Questions

Q1: How has race been theorised within world-systems analysis; why do predominantly economic-centred approaches reach their limits in accounting for race as a formative logic of the modern world-system.

Q2: How does race function as a formative logic within liberalism, shaping its universalist claims, political subjecthood, and regimes of inclusion and exclusion?

Q3: How is race embedded within the structures of knowledge that underpin the modern world-system prior to its formal codification within political institutions and law?

Q4: How are these racialised epistemic formations articulated and reproduced over time within geoculture, political discourse, and institutions of liberal democratic orders?

Q5: How does the material organisation and management of space under liberal democratic orders produce and reinforce the structures of knowledge through which racial hierarchy is rendered empirically visible and self-evident?

## 2.4 Project Outline.

### Part I. Foundations: Race, Liberalism, and the Modern World-System

Part I develops an original interpretation of Immanuel Wallerstein's world-system through a sustained and focused engagement with what his framework theorises regarding race and racism. Although race is not the organising concern of Wallerstein's *oeuvre*, observations and claims about race and racism are distributed across it, appearing in relation to the axial division of labour, the overarching ideology of European universalism, the construction of peoplehood, and the cultural pillar of the world-system. Rather than treating these dispersed engagements as peripheral or supplementary, Part I reads them as a coherent, if undertheorized, account of racial formation within the modern world-system. More broadly, these chapters establish the historical and conceptual foundations within the *longue durée* of historical capitalism and tracing the emergence of its economic, political, and cultural pillars. The purpose of Part I is not to offer a comprehensive history of capitalism, nor a systematic overview of W-SA as such, but to establish what the framework does and does not say about race, and to demonstrate how liberal universalism is constituted alongside enduring forms of racial inequality.

Chapter 3 examines the formations of the capitalist world-economy, focusing on the *longue durée* structure of the axial division of labour that produces the core, semi-periphery, and periphery. While the chapter foregrounds economic organisation, it also introduces the emergence of European universalism as a justificatory framework that naturalises inequality. Race appears here as an emergent classificatory logic that helps stabilise positioning within the capitalist world-economy.

Chapter 4 turns to the political pillar of the world-system by analysing the emergence of modern political ideologies. Using Wallerstein's distinction between the modernity of technology and the modernity of liberation, the chapter examines how centrist liberalism comes to function as the geoculture of the world-system, or what I come to call, the obfuscating mediator. In this capacity, liberalism universalises emancipation while simultaneously delimiting political capacity through the construction of the Citizen, managing the tension between the two modernities by absorbing their contradictions rather than resolving them. Conservatism, liberalism, and socialism are introduced as competing responses to the problem of political authority and social change, with centrist liberalism emerging as the dominant ideological formation because of its capacity to contain and neutralise revolutionary movements and the more 'radical' demands of both socialism and conservatism.

Chapter 5 deepens this analysis by interrogating the figure of the Citizen as the central political subject of liberal geoculture, demonstrating how the universalist claims of citizenship are grounded in the Enlightenment criteria of rationality, civility, and capacity which naturalises a particular racialised and gendered subject as the normative standard of political life. Furthermore, by tracing the co-constitution of citizenship and peoplehood through race, nation, and ethnicity, the chapter shows how race is embedded within political subjecthood prior to its formal codification in law and institutional practice.

Chapter 6 situates these dynamics within the contemporary crisis of the modern world-system. The chapter traces the consolidation and decline of centrist liberalism from the French Revolution to the World-Revolution of 1968, presenting Wallerstein's argument that the crisis is not only economic or political but epistemic or 'cultural-ideological'. The erosion of centrist liberal hegemony as the geoculture of the world-system exposes the contradictions that have always structured European universalism, including its constitutive dependence on racialised exclusions, and opens the question of if the current conjuncture represents a terminal crisis of the world-system itself.

## Part II. Racial Formation Beyond the Economic: Epistemic, Political, and the Material Organisation of the Modern World-System

Part II moves from the interpretative literature review of Part I to a sustained race-critical interrogation of W-SA., identifying where its economic-centred approach to race reaches its explanatory limits. Part II is intentionally diagnostic, elaborative, and critical rather than

theoretically reconstructive in orientation, a task reserved for Part III. As such, the chapters proceed from a position that takes the contributions of W-SA seriously while subjecting its treatment of race to critical scrutiny. Each chapter demonstrates that race is not merely an ideological supplement to economic exploitation but a foundational logic of the MW-S which is not only integral to the function of the system but also essential to understanding the Janus-faced nature of liberal democracy. Additionally, this critical and explanatory work expands and deepens the historical and conceptual scope of the W-SA beyond an economic-centred focus towards the epistemic, political, and material dimensions of racial formation that W-SA has left undertheorized. In doing so, it recognizes that, while economic analysis remains indispensable to understanding the structural and material conditions under which racial inequality is produced and reproduced, whilst illustrating how those conditions acquire their meaning, legitimacy, and durability within and through the structures of knowledge and political discourses that economic determination cannot alone account for.

Chapter 7 subjects the account of race assembled in Part I to a race-critical interrogation, identifying a temporal and conceptual foreclosure imposed on W-SA understanding of race. Through Stuart Hall's (1980) distinction between economic and sociological approaches to race, I situate Wallerstein firmly within the economic camp, one that theorizes race as derivative of the capitalist world-economy. The consequences of which constrain both the historical depth and analytical scope through which race can be theorised. The chapter establishes that this economic reductionism is a structural limitation not only of Wallerstein's work but of W-SA as a tradition.

Chapter 8 deepens this race-critical critique by turning to the structures of knowledge through which European universalism, the human, and the Subject come to be defined within the modern world-system. The chapter traces the displacement of theological authority by secular epistemic formations, examining how the invention of Man through Renaissance humanism and Enlightenment philosophy produces a racially particular conception of the human which presents itself as universal whilst establishing gradations of humanity through which racial hierarchy is rendered intelligible and legitimate. In doing so, the chapter establishes that race is embedded within these epistemic formations at the very foundations of the structures of knowledge that underpin the world-system. This is significant for the project's wider argument: it is through these epistemic formations that Western culture begins to establish itself as the hegemon of the modern world-system, producing the universal standard of Reason, rationality, and humanity from which all other

knowledges and peoples are measured and found deficient. This is, in Gramscian terms, the cultural terrain upon which hegemony is first constituted, and it is continuous with what Wallerstein identifies as the emergence of European universalism as the overarching ideology of the capitalist world-economy. Chapter 8 establishes the epistemic dimension of that hegemony; Chapter 9 traces how it is translated into the political discourse through which it becomes fully entrenched.

Chapter 9 shifts the analysis from epistemic formation to political articulation, tracing how the racialised epistemic formations examined in Chapter 8 are translated into liberal political discourse and later operationalized within the figure of the Citizen. The central argument of the chapter is that liberal political discourse does not merely inherit a racially structured world but actively participates in racial formation and racialised political exclusion. Through a sustained engagement with Hobbes, Locke, Rousseau, and Kant, the chapter traces how political standing is progressively conditioned upon criteria of rationality, moral capacity, and civic virtue that are maintained as formally universal while being unevenly distributed along racial lines in practice. In doing so, the chapter demonstrates that the liberal Citizen does not displace the Cartesian Subject but builds upon it, translating racialised epistemic hierarchies into political differentiation and producing the foundational figure through which the Janus-faced nature of liberalism becomes politically operative within the modern world-system. In this way, race functions not as an external distortion of liberal political thought but as a foundational logic embedded within its most foundational categories.

Chapter 10 extends the race-critical interrogation of W-SA into the material organisation of space, identifying the spatial dimension as a further site at which the framework's economic-centred approach reaches its explanatory limits. The chapter argues that Wallerstein's account of space as a macro-structural map of the axial division of labour cannot theorize the mutual constitution of race and space: that space is racialised and race is spatialized as a foundational and ongoing feature of the modern world-system rather than as a consequence of economic positioning. Furthermore, this mutual constitution is not developed in abstraction from the analysis developed throughout Part II. Specifically, the chapter demonstrates that space is the terrain upon which the epistemic criteria of the Cartesian Subject and the political criteria of the liberal Citizen are rendered empirically legible and self-evident. In doing so, it establishes that the mutual constitution of race and space operates through logics and temporalities that exceed and cannot be derived from the

axial division of labour, and that the spatial logics of racial domination are lived, enforced, and circulated across the world-system rather than confined to its peripheries.

### Part III. Theoretical Integration: Constructing a Race-Critical World-System.

Part III moves from the race-critical elaboration of Part II to the theoretically integrative engagement with W-SA by incorporating three theoretical resources into the framework to begin constructing a race-critical world-system. The purpose of Part III is not to extend the critique of W-SA but to draw on the structural and conceptual foundations established in Part I and the race-critical elaboration of Part II to assemble a framework adequate to establishing race and racism as foundational logics of the modern world-system across its economic, political, and cultural pillars simultaneously. This is accomplished through the integration of the heterarchy, the coloniality of power, and the Racial Contract, each of which contributes a distinct analytical register to the integrated framework.

Chapter 11 integrates heterarchy and the coloniality of power into W-SA in order to establish race and racism as theoretically central to the world-system rather than derivative of its economic architecture. Developed by Grosfoguel (2002; 2006) and elaborated through Castro-Gómez (2023), heterarchy reconceptualises power within W-SA in a manner directly continuous with the logic of articulation, demonstrating that the economic, political, and cultural pillars of the MW-S operate in co-constitutive relation without any single one exercising necessary primacy, such that race functions as a foundational logic entangled across all three pillars simultaneously. The coloniality of power, as theorised by Quijano (2000) and extended by Grosfoguel (2002; 2004; 2016), provides the global-historical conditions through which racial hierarchy persists as a structural feature of the present beyond the formal dissolution of colonial administrations, establishing that the Janus-faced nature of liberal democracy is reproduced through the institutional, epistemic, political, and material organisation of the world-system under the myth of decolonisation.

Chapter 12 integrates the Racial Contract, as theorised by Mills (1997), into W-SA in order to specify the political and epistemological mechanisms through which racial hierarchy is encoded within and obscured by the universalist categories of liberal political order. The chapter establishes how racial hierarchy is encoded within and obscured by the universalist categories of liberal political discourse, such that political subjecthood and epistemological authority are structured through racial differentiation while remaining formally universal. The chapter further extends this analysis into the material organisation of space, through

which these hierarchies are rendered empirically visible, socially operative, and durable across the lifespan of the MW-S.

Chapter 13 brings the project to its conclusion by placing the integrated framework developed in Part III in direct relation to the research questions and returning to the problem of the Janus-faced nature of liberal democracy to ensure that they are addressed directly. The chapter draws together the historical, structural, political, epistemological, and material organisation developed across the preceding chapters in order to show that the apparent contradictions of liberal universalism are not contradictions as such, but follow from the ways in which racial hierarchy is foundational to the modern world-system and embedded within liberal political order. Read in this way, the universalist claims, forms of political subjecthood, and regimes of inclusion and exclusion associated with liberal democracy are understood as grounded in racial differentiation that is obscured and reproduced through the mediating role of liberal geoculture and the structures of knowledge through which it is sustained. Finally, the limits of this project are addressed and possible avenues for future research are proposed.

## Part I. Foundations: Race, Liberalism, and the Modern World-System

Part I develops an original interpretation of Immanuel Wallerstein's world-system through a sustained engagement with what the framework theorizes about race and racism.

Although race is not the organising concern of Wallerstein's *oeuvre*,<sup>1</sup> it appears across his account of the capitalist world-economy, European universalism, the construction of peoplehood, and the cultural pillar of the world-system. Rather than treating these engagements as peripheral, Part I reads them as elements of a coherent, if undertheorized, account of racial formation within the modern world-system. In doing so, these chapters establish the historical and conceptual foundations of the world-system and its liberal geoculture, tracing the emergence and consolidation of its economic, political, and cultural pillars across the *longue durée* of historical capitalism. This reconstruction remains grounded within the framework itself, working from its central concepts in order to establish what W-SA does and does not make available for theorising race within the world-system and its relation to the Janus-faced nature of liberalism.

Chapter 3 brings into focus how Wallerstein conceptualizes the early formation of the modern world-system, with particular attention to the three primary pillars, economic, political, and cultural, that are entangled to the point of co-constitution. The chapter proceeds in two parts. First, it establishes the *longue durée* structures of the capitalist world-economy, including the division of labour across core, semi-periphery, and periphery, in order to provide the macro-historical and structural foundations of the system. In doing so, it situates the economic organisation of the world-system as the material basis through which global inequality is produced and reproduced. Second, the chapter turns to the emergence of European universalism as an epistemic and justificatory framework that develops alongside the capitalist world-economy. In this context, race emerges in relation to these structures, where proclamations of shared humanity coexist with and justify differentiated forms of exploitation.

Chapter 4 turns to the political dimension of the world-system by situating the emergence of modern political ideologies in the wake of the French Revolution and within the broader tension between the modernity of technology and the modernity of liberation; a tension that constitutes the political terrain of modernity itself. In this context, conservatism,

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<sup>1</sup> The most direct engagement with race that Wallerstein (1988) provides is in *Race, Nation, Class: Ambiguous Identities* which was co-authored with Etienne Balibar.

liberalism, and socialism emerge as historically situated responses to the fundamental problem of modernity: who gets to dictate social change within society. The chapter then traces how liberalism comes to occupy a centrist position within this field, while liberal geoculture emerges as the dominant cultural framework through which the tensions between the two modernities are mediated and obscured. Through this mediation, universalist claims are advanced while their scope is simultaneously delimited, providing the conditions under which the figure of the Citizen emerges as the central political subject through which inclusion and exclusion are both institutionalised and rendered legitimate.

Chapter 5 develops this analysis further through the construction of the Citizen by focusing on the exclusionary practices of citizenship and their relation to the formation of peoplehood. In this context, the universalist claims associated with citizenship are organised through distinctions that delimit political subjecthood across class, gender, and race. These distinctions are not external to universalism, but are sustained within it through the structures of knowledge of the world-system. Through these structures, forms of inclusion and exclusion are not only rendered coherent but also legitimate. In this way, the chapter situates the organisation of political belonging within the epistemic conditions of the modern world-system

Chapter 6 situates these dynamics within the contemporary ‘crisis’ of the modern world-system, tracing the consolidation and subsequent decline of centrist liberalism from the French Revolution to the World-Revolution of 1968. In this context, the geoculture of the world-system and the structures of knowledge through which it is sustained, both of which have been foundational in the maintenance of the world-system, are brought into question. As such, the crisis is not only economic or political, but extends to the cultural and ideological conditions that have underpinned the coherence of the world-system. At the same time, the chapter turns Wallerstein’s own analytical framework back onto these developments, extending his logic in a way that brings into view the limits of his account. In this way, the chapter establishes the conditions under which the analysis taken up in Part II becomes necessary.

### 3. The Modern World-System: The Early Foundations.

The intentions of this Chapter are to bring into focus how Wallerstein conceptualizes the early formation of the modern world-system. Within the world-systems framework, there are three primary pillars that are entangled to the point of co-constitution: the economic, the political, and the cultural. As Wallerstein (2004a) contends, they are entangled to the point that reflections upon one pillar would be inadequate without reference to the others. The primary focus of this chapter is the economic pillar. However, due the cultural pillar and the structures of knowledge emerging alongside and entangled with the capitalist world-economy, there will be a brief discussion on the overarching shift in fields of thought that come to justify and support the economic pillar. Further discussion on the cultural pillar and the structures of knowledge will come in the following chapters of focused review.

For the present discussion, there are two primary factors at play, not only in the emergence of the world-system, but in the current crisis of the world-system; the formation of the capitalist world-economy and the formation of the idea-system conceptualized as European universalism. This chapter is divided into two sections to provide Wallerstein's interpretation of these two overarching themes, as they are necessary foundations for the chapters which follow.

Section 3.1. The intentions of this section are to provide a grounding on three fundamental concepts within W-SA: *longue durée*, *économie-monde*, and the axial division of labour. Each of these concepts come together to understand the conception of time, the primary structure of focus, and the material organization of the world-system. The importance of this section rests upon providing the conceptual language for analysing contemporary crises with a macro-historical, structural, and holistic lens that W-SA provides.

Section 3.2. The intentions of this section are to bring into focus the primary and overarching ideological framework that emerges in tangent with, and is fundamental to, the function of the modern world-system. Specifically, the ideology of European universalism and the emergent concept of race which begins to overtake theological hegemony in the "long sixteenth century". This shift towards a universalist epistemology serves the purpose of justifying and rationalizing the economic exploitation inherent to a capitalist world-economy. Racial ideologies emerge as both a signifier of economic positioning and a constraining cultural pillar to justify and maintain varying manifestations of economic exploitation.

### 3.1. The *Longue Durée* of the Capitalist World-Economy

To begin, it would be best to set a few foundations for Wallerstein's approach and who he draws upon to construct his theorizations. There is a large debt to be paid to not only that of Karl Marx but also Fernand Braudel.<sup>2</sup> In fact, it is difficult to understand W-SA without grasping the weaving together of these authors various contributions which ultimately set the overall framework and conceptual language promoted by Wallerstein's formulation of W-SA. Braudel's conceptualization of time as the *longue durée* is fundamental to the macro-historical analysis of Wallerstein and that of W-SA. It is this historical concept that Wallerstein employs to imagine the impact and resilience of capitalist economic structures since their origins in the "long sixteenth century" through to present day (Aguirre Rojas 2012: iv). The *longue durée* conceives of time as:

"a social construct, rather than a simple chronological parameter. He reiterated his conception of time as a *durée*, duration, and his differentiation of a relational plurality of social times – the short term of events or episodic history (for instance, political history), the medium term of conjunctures (such as, among others, economic cycles), and the long term, the *longue durée*, of structures (the organizational regularities of social life). Here, however, he notes a fourth time, that of the very long term (*la très longue durée*, such as that found in the work of Claude Levi-Strauss), 'which knows no change occurrences, no cyclical phases, no ruptures' and limits 'us to the truths that are a bit those of eternal man'" (Lee 2018: 71).

In fact, this is the most basic premise of W-SA, "that historical social systems come into being as a unique and indivisible sets of singular, *longue durée* structures with a beginning and an end, that is, recognizable over the long term, but not forever into the past or into the future" (Lee 2018: 71). Additionally, the structures of this historical system "exhibit secular trends and cyclical rhythms that may be observed over the life of the system" (71). In other words, there may be fluctuations and crises of *longue durée* structures, but when viewed from the macro-lens, there remains a reproduction of the basic premises of the overall structure.

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<sup>2</sup> There are certainly more influences than these select two. Other contributors of note include, but are not limited to, The Annales School, Karl Polanyi, Frantz Fanon, Marc Bloch, Andre Gunder Frank, Nikolai Kondratiev, Samir Amin, Giovanni Arrighi, and Joseph Schumpeter. To name every contribution would be exhausting, for intellectual endeavours are often debt-ridden pursuits.

For the basic overall structure, we need to turn to a second concept stemming from Braudel: *économie-monde*. As Wallerstein (2012) summarizes,

“What Braudel did in *The Mediterranean* was to raise the issue of the unit of analysis. He insisted that the Mediterranean world was a “world-economy.” He got this term from its use in the 1920s by a German geographer, Fritz Rörig, who spoke of *Weltwirtschaft*. Braudel translated this term not as *économie mondiale* but as *économie-monde*. As both he and I were to make explicit many years later, this distinction was crucial: between *économie mondiale* meaning the “economy of the world” and *économie-monde* meaning an “economy that is a world” (198).

Here, it is important to recognize the importance of the hyphen. The hyphen is intended to “underline that we are talking not about systems, economies empires *of the* (whole) world, but about systems, economies, empires *that are* a world (but quite possibly, and indeed usually, not encompassing the entire globe)” (Wallerstein 2004a: 16-17). An economy *that is* the world is known as the world-economy. Consequently, there is a claim to holism.<sup>3 4</sup>

Holism, the notion of a singular system, is what defines the world-systems approach. “If there is one thing which distinguishes a world-system perspective from any other, it is its insistence that the unit of analysis is a world-system defined in terms of economic processes and links, and not any units defined in terms of juridical, political, cultural, geological, etc criteria (Hopkins & Wallerstein 1977: 123). Furthermore, this allows W-SA to shift away from the nation-state as the unit of analysis and avoid claims against methodological nationalism. As such, the modern world-system is one singular “world” which contains a plurality of structures (micro-economic, political, and cultural) that run the course of their lives with secular trends and cyclical rhythms while the *longue durée* structures of the capitalist world-economy remain.

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<sup>3</sup>The fact that there is one singular world-system is often disputed. Andre Gunder Frank (1988; 1993; 1998) has been foundational in contributing to W-SA via their critique of Wallerstein. Among Franks’ many contentions, one is the unrecognized influence of China in the emergence of the world-economy prior to the emergence of capitalism in Europe. While Frank has certainly contributed to W-SA, due to the specific cultural and racial focus of this project, the debates on the origins of capitalism and the world-economy are not fundamental to the current discussion.

<sup>4</sup> Frank (1998) has also posited the notion that the need for the hyphen is restrictive. Not only is there a boundedness that comes with the hyphen, but it overlooks how interconnected the world was prior to the emergence of capitalism. While I do not wish to overlook the interconnectedness of the world prior to the sixteenth century, the hyphen still serves as a conceptual tool to draw attention to the interconnectedness of the system. What Frank takes as a refutation of the interconnectedness of the world-system, I see as symbolic of it. Additionally, and building on my previous comment, much of the focus of these critiques stem from the economic perspective which is only one aspect of focus. Further discussion on this matter will follow in Chapter 7.

The historical social system of focus is that of capitalism, also referred to as historical capitalism. As such, this is not a simple micro-level understanding of capitalism but a macro-level structural understanding of historical capitalism and the persistent power structures within the capitalist world-economy (Wallerstein 2011). When we come to understand the *longue durée* and the world-economy, we have the foundational unit of analysis known as the world-system which is a capitalist world-economy. As Wallerstein (2004b) states,

“We are living in a world-system that is a capitalist world-economy [...] this system is a historical system, that is, it has rules that govern its operations (which make it a system). This system did not always exist. It follows that, during its existence, there have been some constants or repeated patterns also that the prior history of the system creates the framework within which and particular action occurs. And of course, like all systems, our modern world-system is mortal. It will not last forever. It may well be in its terminal crisis now” (1).

To summarize thus far, we currently reside within the modern world-system which is a capitalist world-economy. Wallerstein (2004a) clearly states, “It is and has always been a world-economy. It is and has always been a capitalist world-economy” (23). The world-system has a beginning and will someday end. As such, we currently reside within the modern world system. Throughout the lifespan of our modern world-system, there have been contractions, expansions, and conjectures. However, the *longue durée* structures of the capitalist world economy have remained and continue to work as a force in constraining actions.

What sets this capitalist world-economy apart from previous economic system is the possibility for global interconnectedness. Prior to the emergence of our current world-system, there were “mini-systems”. John Agnew (2021: 19) summarizes,

“one time all societies were ‘mini-systems’ with complete divisions of labour and single cultural systems. Once tied to empires by the payment of tribute, such entities ceased to be systems as such. Empires constitute one of two types of world-systems in this construction. They have a single division of labour but multiple cultural systems and a common political centre. World-economies have a single division of labour and multiple cultural systems but without political unification. Until the advent of European based capitalism, world-economies were unstable and tended toward disintegration or conversion into world-empires. The so-called great

civilizations of China, Egypt, Rome are examples of the world-empires that resulted. Invariably, the world-empires tended to undermine their economic dynamism by swallowing up too much of their surpluses at the centre to fuel bureaucracy”.

Before the modern world-system emerges, the chain of processes that would be required for the accumulation and expansion of capital lacked the necessary production chains (accumulation of stocks, labour-power, expansion of both resources and consumers). Consequently, the expansion of capital would run into roadblocks. In fact, the defining feature of a capitalist world-economy and the world-system is the endless accumulation of capital for the sake of capital (Wallerstein 2011). As Wallerstein (2011: 13-14) states,

“What distinguishes the historical system we are calling historical capitalism is that in this historical system capital came to be used (invested) in a very special way. It came to be used with the primary objective or intent of self-expansion. In this system, past accumulations were ‘capital’ only to the extent that they were used to accumulate more of the same[...] But it was the relentless and curiously self-regarding goal of the holder of capital, the accumulation of still more capital, and the relations this holder of capital had therefore to establish with other persons in order to achieve this goal, which we denominate as capitalist”.

In agreement with Marx and Braudel, Wallerstein (2011) argues that a new capitalist form of world-economy begins to emerge in Western Europe during the shift from feudalism to capitalism during what is called the “long sixteenth century”. It is during this period that the system “expanded in space over time to cover the entire globe by the late nineteenth century, and that it still today covers the entire globe” (19). Of course, we must understand not only the period of emergence of the world-economy, but the spatial aspect of the world-economy.

Wallerstein (2004a: 23) defines a world-economy as a “large geographic zone within which there is a division of labour and hence significant internal exchange of basic or essential goods as well as flows of capital and labour”. These geographic divisions are known as the core, periphery, and the semi-periphery. Consequently, there is not only a temporal understanding of the *longue durée* structures of the world-economy but also a spatial understanding.

To understand this spatial aspect of W-SA, we need to further consider the relationship between the expanding capitalist world-economy and dependency theory.

“Capitalism has always operated by way of a profoundly unequal and asymmetrical hierarchical structure. This structure takes the form of the tripartite divisions of the planet into a small nucleus of very wealthy countries or areas that constitute the core of the system, a similarly small intermediate zone made up of countries and areas that enjoy a moderate degree of wealth and are deemed the semiperiphery, and finally a vast poor and exploited periphery. This periphery represents the immense majority of the world’s area and nations, and as the broad foundation of the system as a whole, it supports both the semiperiphery and the core of the capitalist system” (Aguirre Rojas 2012: x).

Based on unequal exchange and dependency theory, Wallerstein (2011) argues that there is a transfer not only of materials but also of the surplus-value being produced from one zone to another. In this pursuit, capitalist expansion reached across the globe to maximize uneven material exchanges in the constant pursuit of forms of capital and surplus value. “Such a relationship is that of coreness-peripherality” (32). Yet, while earlier formulations of dependency theory framed the periphery as unilaterally dependent on the core, contemporary W-SA emphasizes the reciprocal nature of these relationships. The development of the core is not self-sustaining but instead is dependent upon labour, raw materials, and low-cost production capacities provided by the periphery. This mutual dependence extends to the semi-periphery, which occupies an intermediary position by mediating between the flows of capital and labour, and by both exploiting and being exploited.

For instance, while core states extract surplus value from peripheral zones, yet they also rely on the periphery and semi-periphery to maintain the low production costs and flexibility of production that sustains hegemonic positions. Conversely, peripheral and semi-peripheral regions rely on the core for access to capital, markets, and technological infrastructures (Wallerstein 2004a; 1983). This dynamic renders uneven development not a temporary malfunction but a structural feature of the capitalist world-economy (Agnew 2021: 20). Moreover, while the system is largely hierarchical, there is space for limited

upward mobility within the semi-periphery. However, such mobility rarely disrupts the overall logic of the capitalist world-economy and the world-system.<sup>5</sup>

In sum, the modern world-system came into being during the “long sixteenth century” with the shift from feudalism to capitalism. The modern world-system is a capitalist world-economy. Capitalism is defined as the endless pursuit of capital for the sake of attaining even more capital. Due to the expansionary pursuit of capital, the world-system grew over space and time and spanned the globe by the end of the nineteenth century. During this period the world became divided into three basic geographic zones: the small and wealthy core, the small and moderately wealthy semi-periphery, and the vastly poor and exploited periphery. Each of geographic zones are dependent on each other in various ways and each has the potential of moving towards or away from the core wealthy states. Despite such fluctuations and conjunctures, the *longue durée* structures of the capitalist world-economy have proven malleable and maintained.

### 3.2. European Universalism and Racial Formation

For Wallerstein, it is the core-periphery antimony and the axial division of labour that are fundamental to the emergence of race within the modern world-system. Specifically, race is not peripheral to the system but is essential to the expression of such an unequal exchange. As Wallerstein (1987: 383-385) states,

“Race, and therefore racism, is the expression, the promoter, and the consequence of the geographic concentrations associated with the axial division of labour [...] Racial categorization arose primarily as a mode of expressing and sustaining the core-periphery antimony”.

Racial categorizations signified hierarchical tiers of the international workforce and race itself became an embodiment of economic position (Wallerstein 2011: 78). Racism was both ideology and a set of continuing practices that served as a “justification for the hierarchization of the workforce and its highly unequal distributions of reward [...] which have had the consequence of maintaining a correlation of ethnicity and work-force allocation over time” (78). Consequently, race functions as both an ideology and a practice. Here, we can begin to see the role of ethnicity emerging early within the formation of the world-system and the capitalist world-economy. While Wallerstein is very clear in his

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<sup>5</sup> <sup>5</sup> According to Agnew (2021), The United States and Japan are examples of those that have moved upwards from the semi-periphery to the core. Additionally, Spain moved from the core to the semi-periphery.

argument that prior to the emergence of race there were practices of xenophobia, he does not consider the two as fundamentally connected.

“What we mean by racism has little to do with xenophobia that existed in prior historical systems. Xenophobia was literally fear of the ‘stranger’. Racism within historical capitalism has nothing to do with ‘strangers’. Quite the contrary. Racism was the mode by which various segments of the work-force within the same economic structure were constrained to relate to each other. Racism was the ideological justification for the hierarchization of the work-force and its highly unequal distributions of reward. What we mean by racism is that set of ideological statements combined with that set of continuing practices which have had the consequence of maintaining a high correlation of ethnicity and work-force allocation over time (Wallerstein 2011: 78).

Wallerstein claims that the primary difference between xenophobia and racism is the belief that certain groups claim to superiority in characteristics relevant to economic performance. Furthermore, that these beliefs came into being after the emergence of global division of labour (78). Consequently, the origins of racism are in the roots of the global economic system of capitalism. As such, “racism served as an overall ideology justifying inequality” and to “socialize groups into their own role in the economy” (79). Most importantly from this understanding of race and racism is that it is a post hoc and economically deterministic understanding.

Additionally, once racial ideologies begin to take hold, they come to serve as a self-suppressing and oppressive ideology. As the “cultural pillar” of the world-system, racial thinking provides the intellectual frameworks that both guide and impose upon behaviours and aspirations.

“The attitudes inculcated (the prejudices, the overtly discriminatory behaviour in everyday life) served to establish the framework of appropriate and legitimate behaviour for oneself and for others in one’s own household and ethnic group. Racism, just like sexism, functioned as a self-suppressing ideology, fashioning expectations and limiting them. Racism was certainly not only self-suppressive; it was oppressive. It served to keep low ranking groups in line, and utilize middle-ranking groups as the unpaid soldiers of the world police system [...] racism structurally set victims against victims” (Wallerstein 2011: 79).

The result is a racial hierarchy that reflects, conditions, and constrains individuals/groups within their respective positions of the workforce. As such, “racism has been of the greatest importance in construction and reproduction of appropriate workforces” (80). However, there is a consistently reacting and evolving global workforce. Consequently, the hierarchization of the ethnic/racial workforce was relatively unstable. “Groups came and went and changed their self-descriptions with considerable ease (and were perceived by others as having different boundaries with equal ease)” (Wallerstein 2011: 80). In other words, much like the changing positions within the axial division of labour, racial hierarchies can also evolve with the economic divisions. Despite this, over the *longue durée*, there has not been a fundamental shift in the racial hierarchies. Yet, Wallerstein does not contend that race and racism are the only nor, arguably, the most fundamental ideological pillar in the capitalist world-economy.

“Racism has thus been a cultural pillar of historical capitalism. Its intellectual vacuity has not prevented it from unleashing terrible cruelties [...] Racism, however, has not been the only ideological pillar of historical capitalism. Racism has been of greatest importance in construction and reproduction of appropriate work forces [...] The primary ideology that operated to create, socialize, and reproduce them was not the ideology of racism. It was universalism [...] The essence of this view is that there exist meaningful general statements about the world - the physical world, the social world - that are universally and permanently true, and that the object of science is the search for these general statements in a form eliminates all the so-called subjective, that is, all historically-constrained, elements from its formulation” (Wallerstein 2011: 80-82).

For Wallerstein (2011; 2004a: 39; 1990: 39), universalism is the official ‘gospel’ of modernity, serving as a justificatory system to rationalize the inherent contradictions within the capitalist world-economy. While racism has been instrumental in the construction and reproduction of labour forces, the overarching ideological pillar that facilitated this process is universalism. Universalism highlights the intellectual framework that made the exploitation and subjugation of different populations possible by cloaking it under a supposedly benign and rationalist ideology. As such, universalism is an epistemology or a set of beliefs about what can be known within the world and the means through which these knowledges can become known.

Richard E. Lee (2023) expands on Wallerstein’s claim by further articulating this epistemological shift at the birth of modernity and the capitalist world-economy.

“The primary epistemological antinomy defining the *longue durée* structures of knowledge grew out of the transformation of late-feudal social relations and intellectual frameworks that occurred as the internal processes of their reproduction met with a series of external shocks resulting in the emergence of what would become the European “core” of the modern world-system. By the beginning of the long sixteenth century, new cognitive modes of apprehending human reality had begun to coalesce in the form of an epistemological hierarchy unique in human history in which authoritative knowledge, or facts, was progressively defined as the “other” of spiritual/moral values—thus separating the true from the good” (Lee 2023: 44).

As the core European powers are expanding their economic foothold in the world-economy, there is also emerging imposition of a universalist epistemology diminishing the theocentric ontologies and epistemologies that were hegemonic prior to the establishment of modernity.<sup>6</sup> As the world-system emerges in the roughly the sixteenth century, there is also the emergence of new knowledge structures that come to rationalize the systems of exploitation which the capitalist world-economy are predicated upon and continually reproduce.

Previously, inequalities were justified and rationalized as some form of divine will (Wallerstein 2003). With this shift away from religious hegemony, the cognitive structures to come to terms with the economic inequalities begins to be grounded in the blossoming sciences of the period. As such, for Wallerstein, universalism is understood as the epistemology which begins to emerge in the “long sixteenth century” which support the racial ideologies that are essential in justifying and reproducing capitalist exploitation. Such is evidenced by Wallerstein’s (2006: 1) statement,

“European universalism is used to justify imperialism, Western expansionism. The first, the most brutal [...] consists in saying that the others are barbarians, whom we must tame. A second variant, a little more subtle, studied by Edward said under the name of ‘Orientalism.’ Claims that the others are different beings, fixed in their differences, to whom we must bring true civilization [...] Lastly, a third type of

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<sup>6</sup> This is not to say that there was not a very strong presence of theocentric thinking. In fact, you could still say religion remains very prominent today. However, Wallerstein argues that roughly during this time that a power shift begins to emerge with the core states to decentre religious hegemony.

argument is that of scientific truth to which one appeals to impose the Western point of view. And, as it so happens, this alleged scientific truth is held by the most powerful countries in the world”.

Emerging alongside the capitalist world-economy, the evolving knowledge structures of the period were justifying material exploitation by constructing Otherness under the guise of ‘objective’ science. Non-European powers were viewed as ‘barbarians’, Orientals, different beings, uncivilized, or simply less-than. For Wallerstein, it is this entanglement of universalism and racism/sexism that is integral to the justification and reproduction of economic exploitation. Or, inversely, the economic that influences not only racism and sexism but the epistemological realities of the period. In fact, it is this entanglement which is essential in overcoming the contradictions of the capitalist world-economy.

“The heart of the debate it seems to me, revolves around the ways in which the presumed antimonies of unity and diversity, universalism and particularism, humanity and race, world and nation, person and man/woman have been manipulated. I have previously argued that the two principal ideological doctrines that have emerged in the history of the capitalist world-economy – that is, universalism on the one hand and racism and sexism on the other – are not opposites but a symbiotic pair. I have argued that the ‘right dosage’ has made possible the functioning of the world-system” (Wallerstein 1990: 39).

This symbiotic pairing is essential to the debate on how to overcome economic inequalities. There is an assumption that if there were further support for a more universalist ideology in the capitalist world-system, there would be a negative correlation with the degree of inequality associated with racism and sexism. Yet, the opposite has proven to be true or, at the very least, has not led to a resounding decrease in such inequalities (Wallerstein 1991: 32). What we can draw from this conclusion is that there is a co-dependent relationship between the capitalist world-economy and the antimony of universalism and particularism in the form of racism/sexism. In fact, this linkage is essential to the function of the world-system. There is a necessary balance between the ‘inclusiveness’ to the capitalist world-economy and those who are designated to be excluded (or included at a lower tier of the hierarchy) (Wallerstein 1991: 35-36).

In sum, there is a symbiotic relationship between universalist and the anti-universalist racial ideological pillars of the capitalist world-system. The universalist

doctrine, the most fundamental to that of modernity and the justification of the contradictions of the capitalist world-economy, influences and is influenced by racial ideology. In other words, if the modern world-system puts forth the proclamation that there is a commonality amongst all of humanity, racial ideologies serve the function of justifying which forms of humanity are to be exploited in the endless pursuit of evermore capital. The emergence of the *longue durée* structures of the capitalist world-economy can both be traced back to the origins of the modern world-system in the “long sixteenth century”. Yet, while these ideological pillars emerge alongside and evolve with the modern world-system, they find the most prominent influence within the political framework which emerges throughout the eighteenth and nineteenth centuries.

Thus far I have only explicitly discussed that of the economic pillar of the world-system and the overarching ideology of the cultural pillar conceptualized as European universalism. Shifting away from the economic discussion, we do not see the role of race and racism prominently emerge again until the origins of modern political ideologies. Furthermore, it is during the “first world-revolution” in which we see the role of universalism take further hold. It is now time to turn our attention to the political. Rather pertinently, Agnew (2021: 20) reminds us that the world-system is “glued together not just materially but by dominant political ideologies”. In the following chapter, I will focus on the emergence of modern political ideologies and the role these play within the world-system in the construction of race and racism.

#### 4. Modern Political Ideologies: Liberalism and The Construction of the Citizen

In the previous chapter, I presented the overall economic and cultural framework of world-systems analysis formulated by Immanuel Wallerstein. There are three fundamental points which were discussed. First, the modern world-system is a capitalist world-economy which emerges throughout the “long sixteenth century” and globalized by the nineteenth century. Second, emerging in tangent and fundamental to function of the modern world-system, the ideology of European universalism begins to overtake theological hegemony. This shift towards a universalist and particularist epistemology serves the function of justifying and rationalizing the economic exploitation inherent to a capitalist world-economy. Third, the particularist racial ideologies emerge as both a signifier of economic positioning and a constraining cultural pillar to justify, maintain, and reproduce varying forms of economic exploitation.

The intentions of this Chapter are to bring to life how Wallerstein and W-SA tells the story of universalism contributed to the birth and function of modern political ideologies in the world-system. Yet, this is just as much about the story of two competing modernities and an obfuscating geoculture as it is the story of political origins. Each of these concepts and historical conjunctures provide a profound influence on one of the most influential and controversial concepts that is essential for this research project: the Citizen.

Section 4.1 is a broad discussion on two competing and contradictory forms of modernity so defined by Wallerstein: the modernity of technology and the modernity of liberation. Additionally, I shall then introduce the concept of ‘geoculture’ which serves as a mediator for obfuscating such contradictions. The importance of this section is to begin recognizing the role the political and cultural pillars play in maintaining the capitalist world-economy. Furthermore, this discussion also sets the analytical foundations for an analysis of the Janus-faced nature of Western liberal politics via the contradictions between the two modernities and the discursive construction of the concept of the Citizen.

Section 4.2 is a historical telling of how the three primary political ideologies of the modern world-system emerge as a reaction to the two competing modernities: conservatism, liberalism, and socialism. Throughout this discussion, there will be a focus on the general approaches to each of the political approaches to a fundamental question of modernity: who is most capable to dictate change within a society. Finally, there will be a brief introduction to the concept of the Citizen which serves as a symbolic and materially

constructive concept regarding who is afforded the right to dictate change in society. An in-depth discussion on the construction of the Citizen will follow in Chapter 5.

#### 4.1. Two Modernities

It is difficult to understate the importance of the French Revolution for W-SA. While the world-system may have found its origins within the “long sixteenth century” and spanned the globe by the nineteenth century, Wallerstein argues that it was not until the French Revolution (1789 & 1848) that we have the ‘first great political expression of the Enlightenment’ and the heart of modernity.

“The French Revolution transformed mentalities and established 'modernity' as the *Weltanschauung* [philosophy or view of life] of the modern world. What we mean by modernity is the sense that the new is good and that it is desirable, because we live in a world of Progress at every level of our existence. Specifically, in the political arena, modernity meant the acceptance of the 'normality' of change, as opposed to its 'abnormality', its transitory character” (Wallerstein 1992: 97).

Modernity is a culmination of a particular social reality and a worldview which has come to replace the previous (Wallerstein 1995). If we recall the sixteenth century early formations of universalist ideology discussed in the previous section, there was a fundamental epistemic shift that occurs in tangent with the growth of the world-system. When such a shift occurred in the realm of the evolving sciences of the period, supposedly ‘objective scientific truths’ were given more authority than the ‘subjective’ theological epistemologies. Yet, this was not the only expression of the universalism and connotation of ‘modern’ or embracing ‘modernity’. In fact, Wallerstein (1995) claims for there to be two symbiotic and competing modernities that come to form the central cultural contradiction of the modern world-system: the modernity of technology and the modernity of liberation.

I shall quote at length Wallerstein’s outlining of these two modernities, for they come to set the stage for the political debates of the nineteenth century, and, in many ways, the moral and institutional crises faced today.

“[...] modern had two clear connotations. One was positive and forward-looking. Modern signified the most advanced technology. The term was situated in a conceptual framework of the presumed endlessness of technological progress, and, therefore, of constant innovation. This modernity was in consequence a fleeting

modernity – what is modern today will be outdated tomorrow. This modernity was quite material in form: airplanes, air-conditioning, television, computers. The appeal to this kind of modernity has still not exhausted itself [...] There was in addition, however, a second major connotation of the concept of modern, one that was more oppositional than affirmative. One could characterize this other connotation less as forward-looking than militant (and also self-satisfying), less material than ideological. To be modern signified being antimodieval, in an antimony in which the concept medieval incarnated narrow-mindedness, dogmatism, and above all the constraints of authority [...] It was all the classical ‘Revolutions’ – the English, the American, the French to be sure, but also the Russian and the Chinese. In the United States, it was the doctrine of the separation of church and state, the first ten amendments to the U.S. Constitution, the Emancipation Proclamation, Clarence Darrow at the Scopes trial, Brown v. the Board of Education, and Roe v. Wade. It was in short the presumptive triumph of human freedom against the forces of evil and ignorance. It was a trajectory as inevitably progressive as that of technological advance. But it was not a triumph of humanity over nature; it was rather a triumph of humanity over itself, over those with privilege. Its path was not one of intellectual discovery but of social conflict. This modernity was not the modernity of technology, of Prometheus unbound, of boundless wealth; it was rather the modernity of liberation, of substantive democracy (the rule of the people as opposed to that of the aristocracy, or the rule of the best), of human fulfilment, and, yes, of moderation. This modernity of liberation was not a fleeting modernity, but an eternal modernity. Once achieved, it was never to be yielded” (Wallerstein 1995:126-127).

For Wallerstein, there are two different connotations for the concept of “modern” and newly emergent worldview of ‘modernity’. This struggle is not confined to a singular conception but embodies two very real competing realities within the world-system: the modernity of technology and the modernity of liberation. The modernity of technology is the worldview that drives technological progress and innovation through mastery of the natural world. Within the capitalist world-economy, such mastery would push forward the pursuit of new materials and innovations. However, while there are new products for consumers, this also greatly benefits the core-like nations and capitalist producers. New materials and technologies could increase production efficiency, reduce internal costs, and can expand the global market (Wallerstein 1974).

Furthermore, retainment and reinvestment of capital allows for further investment into technological innovations that could be used to reinforce not just economic powers but military powers. The result of which would create, maintain, and further instantiate not just the economic prowess but military dominance of the core nations. Consequently, the modernity of technology is not simply reduced to consumer goods and relations of production but has a major role in driving social inequality, solidifying hegemony, and promoting the expansion of the capitalist world-economy (Wallerstein 1974; 1995).

The second competing modernity is that of liberation. The modernity of liberation is the political embodiment of the progressive drive for a “good society” and is a response to the inequalities inherent to the capitalist world-economy. As Wallerstein (1998) has stated, “the history of the modern world-system is one of repeated struggles for liberation from the oppressive structures of capital and the state” (57). This struggle for liberation is repeated, endless, and constrained by the structures of the capitalist world-economy. Within the world-system, the modernity of liberation promises salvation from exploitation while the modernity of technology tacitly forms new modes of domination. A struggle to liberate humanity from its own inhumanity.

Additionally, the modernity of liberation is emblematic of the separation between church and state, aligning with the fundamental epistemological shift away from religious hegemony within the political realm. Prior to this point, Wallerstein (2003) contends that for three centuries the problem of political change overcoming the material inequalities of the capitalist world-economy was hardly approached in the modern world-system. In fact, there were strong remanences of the premodern or medieval epistemologies to explain the impact of the capitalist world-economy. As Wallerstein (2003: 650) summarizes,

“Inequality was still considered natural, indeed ordained by God. But once the revolutionary upsurge of the late eighteenth century transformed the language of equality into a cultural icon, once challenges to authority were commonplace, the disparity of theory and practice could no longer be ignored. The need to contain the implications of this cultural claim, and thereby tame the now “dangerous classes”, became a priority of those in power. The construction of the liberal state was the principal framework that was built to limit the claim. The elaboration of modern political ideologies was in turn an essential mechanism in the construction of the liberal state”.

This “revolutionary upsurge” comes to be known as the ‘most terrible and momentous series of events in all history’ that helped set the political foundations of the

modern world (Hobsbawm 1989: 10). Between 1793 and 1794 roughly 17,000 had been officially executed with another 10,000 being imprisoned, many without trial (Ray 2023). Within the carnage of unbounded revolutionary spirit, the desire of the masses to overcome their economic exploitation and embrace the cultural revolution that placed sovereignty in the hands of the newly articulated concept of Citizen was conceded.

When considered in the context of the state, universalism would imply such rules as universal suffrage, equality in the eyes of the law, the view that political change is not just inevitable but becoming normalized, and the power (sovereignty) to dictate these changes lay in the hands of the newly constructed title of “citizen” (Wallerstein 2011a: 38). Even today, “virtually every country claim that its citizens are all equal and exercise their sovereignty through a system of universal suffrage” (Wallerstein 2004: 51).

Structurally and discursively, what emerged set precedent that remains present today. For example, following the first Revolution in 1789, the French National Assembly adopted the Declaration of the Rights of Man and the Citizen. Ever since, it remained the symbolic assertion of human rights which was reaffirmed by the United Nations in the 1948 Universal Declaration of Human Rights (Wallerstein 1995: 145). Yet, despite such concessions and despite the universalist claims of progress and inclusivity, the political modernity of the world-system found its articulation in the constraints set by the *longue durée* structures of the capitalist world-economy (Wallerstein 1989). This is especially problematic when inequality and exploitation are part and parcel of the pursuit of surplus-capital.

“Once people thought that political change was normal and that they in principle constituted the sovereign (that is to say, the decider of political change), anything was possible. And this of course was precisely the problem that faced those who were powerful and privileged within the framework of the capitalist world-economy. The immediate focus of their fears was to some extent the small but growing group of urban industrial workers. But, as the French Revolution had amply demonstrated, rural non-industrial workers could be quite as troublesome or fearsome from the perspective of the powerful and privileged. How were these 'dangerous classes' to be kept from taking these norms too seriously, and thereupon interfering with the process of capital accumulation by undermining the basic structures of the system? This was the political dilemma that was posed acutely to the governing classes in the first half of the nineteenth century” (Wallerstein 1989: 6).

The confrontation between the two contradictory worldviews emerges at the beginning of the world-system in the ‘long sixteenth century’, finds structural influence in the French Revolution, and remains in a form of symbiotic crisis today. How to approach this modern governance problem is directly related to the formation of the three primary modern political ideologies: conservatism, liberalism, and socialism.<sup>7</sup> Each of these political ideologies were caught in a battle over providing legitimacy to their claims of who would be the entitled with the power of the sovereign and therefore, able to dictate change in society.

Additionally, and very importantly, the cultural contradiction of the two modernities and emergence of political ideologies is fundamental to the creation of what comes to be known as ‘geoculture’. Geoculture is necessarily cultural backdrop linked to the emergence and evolution of political ideologies which shapes, legitimizes, and becomes hegemonic throughout the world-system (Wallerstein 1991). Furthermore, geoculture serves as an obfuscating mediator between the two modernities – proclaiming equality whilst new forms of domination take hold. As Wallerstein (1995: 126-127) states,

“[...] if there was a cultural contradiction, it was that the capitalist world-economy was functioning economically and politically within a framework that lacked the necessary geoculture to sustain it and reinforce it. The overall system was thus maladapted to its own dynamic thrusts. It may be thought of as uncoordinated, or as struggling against itself [...] a geoculture was elaborated that was designed instead to promote the modernity of technology while simultaneously containing the modernity of liberation”.

A crucial element of this geocultural framework is universalism, which plays a fundamental role in maintaining the ideological coherence of the world-system. Universalism promotes the idea that certain values, such as human rights, democracy, and equality, are universally valid and should be applied across all cultures and societies (Wallerstein 2006). This newly emergent global mediator emerges with the French Revolution and serves to promote the expansion of the capitalist world-economy whilst promising liberation. The concept of geoculture represents the dominant cultural framework that allows the capitalist world-economy to function and expand despite challenges from the modernity of technology.

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<sup>7</sup> There are certainly many different articulations of these political ideologies. In fact, Wallerstein (1995) claims there ‘as many political ideologies as political ideologists’. Despite such variance in their manifestations, Wallerstein considers there only to be three political ideologies on a general level.

Geoculture, therefore, employs universalism as a tool to mediate the tension between the modernity of technology and the modernity of liberation. While the modernity of technology drives the expansion and domination of the capitalist world-economy, universalism helps to present this expansion as a morally justified and universally beneficial process. By promoting ideals that appear to transcend cultural and political boundaries, universalism helps to obscure the underlying inequalities and exploitation that accompany the spread of capitalist exploitation. As Wallerstein (1995: 126-127) argues, the development of geoculture was essential in promoting the modernity of technology while containing the modernity of liberation, thus ensuring the stability of the world-system.

Yet, to fully grasp the concept of geoculture and how it comes to represent an obfuscating mediator, we must also come to understand the emergent modern political ideologies in the wake of the French Revolution as each representing a reaction to the two modernities. In fact, modern political ideologies “were an innovation emerging out of the new cultural situation created by the French Revolution” (Wallerstein 1995: 130). In summary, the French Revolution are emblematic of the emergence of two competing modernities: the modernity of technology and the modernity of liberation. Each providing promises of a form of universal progress that seem to contradict each other. In order to obfuscate the exploitative nature of the modernity of liberation, a culture framework emerges known as the geoculture of the world-system. The geoculture preaches the modernity of liberation whilst institutionalizing the modernity of technology. Furthermore, it is the geoculture which helps shape the modern political ideologies which emerge following the French Revolution.

In the following sub-sections, I will expand on each of these political ideologies, their approach to the promises of modernity, and the impact such approaches have had on the geoculture of the world-system. Fundamentally, this also involves a discussion on the construction of the “Citizen” which becomes a discursive tool of differentiation that straddles the line between each of the two conceptions of modernity. Each of these constructions are fundamental to understanding the Janus-faced nature of liberalism. I will conclude with a discussion on the relationship between the concept of the Citizen and the construction of racial ideologies.

#### 4.2. Modern Political Ideologies

What makes the French Revolution unique within W-SA frameworks, is that the two contradictory modernities fuse together in the origins and evolutions of political ideologies and the constraining geoculture of the world-system (Wallerstein 1995). As previously stated, the modernity of technology is not simply understood as a driver of

innovation but a force that expands and solidifies the hegemonic power of the core nations. The modernity of liberation is the competing and contradictory worldview that promises to overcome the exploitation required for the capitalist world-economy and the modernity of technology.

Despite Wallerstein's explicit attention to the French Revolution for the structural origins of the modernity of liberation, such struggles are not simply reduced to these events. Wallerstein considers this moment to be reflective of a global phenomenon that sets the foundations of the political debates from the eighteenth century onward.

“The French Revolution was not an isolated event. It might rather be thought of as the eye of a hurricane. It was bounded (preceded and succeeded) by the decolonization of the Americas – the settler decolonization's of British North America, Hispanic America, and Brazil; the slave revolution of Haiti; and the abortive Native American uprisings such as the Tupac Amaru in Peru. The French Revolution connected with, and stimulated struggles for, liberation of various kinds as well as nascent nationalism throughout Europe and around its edges – from Ireland to Russia, from Spain to Egypt. It did this not only by evoking in these countries resonances of sympathy for French revolutionary doctrines but also provoking reactions against French (that is, Napoleonic) imperialism, couched in the name of these very same French revolutionary doctrines” (Wallerstein 1995: 129).

Reverberating across the world-system, culminating in and growing out of the French Revolution, rebellions against the exploitative status quo mobilized. Once the modernity of liberation and the enticing discourses of liberty began to take hold, there was a fundamental crisis of the unincumbered accumulation of capital in the world-economy. In response, modern political ideologies emerged as reactions to the competing modernities. Within the W-SA framework, the primary focus of this political debate is perceived as inclusion within the capitalist-world economy through class struggle. I do believe it necessary to understand how Wallerstein conceptualizes ‘political ideologies’. Despite employing a more conventional conception of ideology at varying points of his work, this is very clearly where there is an expansion on the concept specifically for the political domain. For Wallerstein (2004a: 60-61),

“An ideology is more than a set of ideas or theories. It is more than a moral commitment or a worldview. It is a coherent strategy in the social arena from which

one can draw quite specific political conclusions. In this sense, one did not need ideologies in previous world-systems, or indeed even in the modern world-system before the concept of the normality of change, and that of the citizen who was ultimately responsible for such change, were adopted as basic structural principles of political institutions. For ideologies presume that there exist competing groups with competing long-term strategies of how to deal with change and who best should take the lead in dealing with it. The ideologies were born in the wake of the French Revolution”.

Wallerstein defines political ideologies as tactics that come to represent the belief in who should be able to dictate changes in society. Very often, these changes were directed at the pervasive economic inequalities inherent to the capitalist world-economy and were therefore, class related positions. While they may be influenced by certain embrace or disregard of the competing modernities, they cannot be reduced to such. These newly evolving political ideologies were posed against each other in a debate that remains prominent today: in which ways should society progress and who is best suited to make these choices (Wallerstein 1989; 1995; 2004a; 2010). From 1789 to 1848, there were only two primary political ideologies that stood in opposition to such a dilemma.

The first of the political ideologies to develop was conservatism. Settling in the wake of the tumultuous Revolution, conservatives considered the principles instantiated a resounding social disaster. “What particularly upset them was the argument that the social order was infinitely malleable, infinitely improvable, and that human political intervention could and should accelerate changes” (Wallerstein 2004a: 61). As a consequence of not simply disdain for the revolutionaries but also fear, conservatives highly questioned the idea of inclusive citizenship. Such important decisions could not be left to the supposed frothing masses who lacked ‘civilized’ moral capacities.

The conservative’s “tactic” was an attempt to constrain the actualization of the modernity of liberations’ promises of universal equality by narrowly defining access to citizenship. Instead, conservatives sought to restore and maintain faith within traditional political and religious hierarchies. It was only those traditional political structures who could be trusted with the duty of directing social change. As such, conservatives looked upon modernity’s ideals with contempt and many were considered to be counter-revolutionaries who wished to restore the Ancien Regime (Wallerstein 2004a: 62). The result of which would ensure their privileged positions within the socioeconomic hierarchies.

It was not until 1815 with Napoleon's defeat that a counter-ideology fully emerged. The counterposed ideology to conservatism is liberalism. Liberals attempted to salvage the revolutionary spirit whilst distancing themselves from the bloodshed of the French Revolution (Wallerstein 2004a). The blood stains of the Revolution not only put the fear of social chaos in the minds of the conservatives but also that of the liberals. However, despite sharing apprehensions, liberals insisting that social change was inevitable and tentatively embraced the coming of modernity. However, they did so whilst claiming that overly hasty change could be problematic and ultimately be counterproductive. In other words, liberals did not have a problem with hierarchies in general, but with inherited hierarchies which they considered illegitimate. As Wallerstein (2004a: 63) summarizes,

“They were not against what they thought of as natural hierarchies; they were against inherited hierarchies. Natural hierarchies, they argued, were not only natural but acceptable to the mass of the population and therefore a legitimate and legitimated basis of authority, whereas inherited hierarchies made social mobility impossible”.

Additionally, liberals were not opposed to upward mobility. In fact, they consider it a redeeming quality of social order (Wallerstein 2004a). Yet, still isolating the memory of the Revolution and distancing themselves from the moblike mentality, they had to question who were to be the select few that could make these important decisions on the progression of society and the maintaining of social order.

“The liberal concluded, that there was only one group that should take the lead and the responsibility for deciding on what changes were necessary – the specialists. Specialists, by definition, understood the realities of whatever they had studied and therefore could best formulate the reforms that were necessary and desirable. Specialists, by their training, were inclined to be prudent and insightful. They appreciated both the possibilities and the pitfalls of change. Since every educated person was a specialist in something, it followed that those who would be allowed to exercise the role of citizen were those who were educated and were therefore specialists. Others might eventually be admitted to this role, when they had received the proper education to permit them to join the society of rational, educated men” (Wallerstein 2004a: 63).

In practice, liberals were inherently moderate and sceptical of radical change. Furthermore, the continual desire to refer to the specialist, without such hasty decision making, often left timely matters unattended to. Whilst liberals did promote social mobility and the necessity for those select educated few to make important decisions in society, such individuals were often already within the upper strata of the social hierarchy (Wallerstein 1992; 2004a). What is important to understand about this implicit contradiction is that whilst liberalism discursively embraced the modernity of liberation, they also fully embraced the modernity of technology. They wished to open citizenship to specialists whilst preventing the masses from having influence. As a result, those that had influence and power in the economic realm, those that were benefitting from the modernity of technology, were also to be those that could dictate the changes in society for their own benefit (Wallerstein 1995).

Throughout the first half of the “long nineteenth century”, these two political ideologies were pitted against each other as the ‘Party of Order’ vs the ‘Party of Movement’ (Wallerstein 1992; 2004a). It was not until the “first world revolution” of 1848 when a third contender entered the scene that desired inclusion of the mass populace. This newly emergent political ideology was seen as “radical”, for they wholeheartedly embraced the modernity of liberation. It is these very same radicals who came to be known as “socialists” or “democrats”.

During the so-called “springtime of nations”, urban workers acquired minimal power in France - along with many other national/nationalist uprisings across the West. It was these “radicals” who were frustrated with a fundamental problematic associated with liberal politics: the snail’s pace at which specialists instituted change. Despite growing increasingly frustrated with the slow progress made within the liberal party the ‘radicals’ also exhibited an outright disdain for the conservative party (Wallerstein 2004a). The ‘radicals’ believed that the voice of change should be considered throughout the members of society and wholeheartedly embraced the prospect of the modernity of liberation. Within the political climate post-French Revolution in the nineteenth century, the idea of the masses dictating the ways in which society would progress was a “political nightmare” and the very utterance of democracy at the time “had the tonality of terrorism today” (Wallerstein 2010). Furthermore, it did not help the radicals cause to pursue their means through often violent revolutionary workers protests (Wallerstein 1992; 2004a; 2003).

The emergence of the ‘radical’ socialist or democratic political ideology in the wake of 1848 set the foundations of the modern political language still in (varying) use today. The right-wing conservatives, the centrist liberals, and the left-wing socialists. These

three political ideologies were set against each other in a fight for which of the two modernities would prevail. In an odd twist of fate, the fear of further violent revolutions influenced the right-wing conservative party to institute the liberal agenda. In fact, many of the concessions made by those in power were awarded to keep the mobs from their doors. Out of fear of the radical politics of the left, minor concessions were put in place to provide a temporary relief from the political turmoil. Consequently, this leads Wallerstein (2004a; 1995) to argue that, historically, centrist liberalism has been the most successful in achieving their goals. Such success has been so prominent that by the mid nineteenth century the socialist and conservative political parties tended to define themselves in liberal categories such as conservative liberals or socialist liberals (Wallerstein 1991: 9). In a period that saw continual and pervasive violent uprisings, liberalism provided a means to quell the masses.

“In effect, liberalism offered itself as the immediate solution to the political difficulties of both the Right and Left. Liberalism was centrism incarnate, and its siren was alluring. For it was not a mere passive centrism that it preached, but an active strategy. Liberals put their faith in one key premiss of Enlightenment thought: that rational thought and action were the path to salvation, that is, progress. Men (it was rarely a question of including women) were naturally rational, were potentially rational, were ultimately rational. It followed that ‘normal political change’ ought to follow the path indicated *by those who were most rational – that is, most educated, most skilled, therefore most wise*” [emphasis added] (Wallerstein 2012: 6).

In their tentative embrace of modernity of liberation, liberals committed to a program that would provide the power of sovereignty to specialists and to continue to proclaim the universalist notion of pursuing equality in every domain. The dualistic approach to preach the modernity of liberation whilst putting in place the modernity of technology proved to be the mediator that the cultural contradictions of the world-system required. Thus, centrist liberalism, through its mediation between contradictory worldviews, was able to implicitly mould the incompatible worldviews into an institutionalized rationalization. It did so through the adoption of the liberal agenda on the state level that was conceded by both the left and the right.

“Liberalism, far from being a doctrine that was antistate in essence, became the central justification for the strengthening of the efficacy of the state machinery.

This is because liberals saw the state as essential to achieving their central objective – furthering the modernity of technology while simultaneously judiciously appeasing the ‘dangerous classes’. They hoped thereby to check the precipitate implications of the concept of the sovereignty of the ‘people’ that were derived from a modernity of liberation” (Wallerstein 1995: 132).

The liberal program had three main elements. First, the gradual extensions of the suffrage along with expanding access to education. Second, ensuring that the state must protect its citizens from harm in the workplace. This included expanding health facilities and providing access to them. Third, was to “forge citizens of a state into a ‘nation’” (Wallerstein 2004a: 64; Wallerstein 1995). Under the visage of inclusive citizenship, which was institutionalized in 1789 with the Declaration of the Rights of Man and of the Citizen, the political discourse and rhetoric of antisystemic movements was to gain the status of Citizen. However, the concept of the Citizen, while intended to be inclusive, was inherently exclusionary.

“Universal rights turned out in actual practice to be somewhat of a linguistic mirage, an oxymoron. The republic of virtuous equals turned out to require the rejection of the non-virtuous” (Wallerstein 2003: 652).

Especially important in this brief passage is the concept of virtue. Within Enlightenment thought that saturates the Revolution, virtue comes to represent the morally good, a capacity to apply the correct moral judgement through the application of Reason, and virtue represents the moral development of a person. As such, the political is constructed as also as a moral realm, which is entangled with the cultural pillar of the world-system. In the context of liberalism and the institutionalization of the liberal agenda, it meant that virtue could be taught. The result of which allowed for a barrier to be put in place that managed who could and could not be full citizens (Wallerstein 2003).

In summary, the aftermath of the French Revolution crystallized the contradictory modernities of technology and liberation into the formation of modern political ideologies. Conservatism, liberalism, and socialism/democracy each represented a tactic of how to approach issues of social change, citizenship, and material positioning within the capitalist world-economy. What emerged was not simply a debate over governance but the geocultural terrain of the modern world-system, in which universalism and the promises of equality were institutionalized in ways that also reinforced exclusions. Centrist liberalism proved to be especially effective as a mediating force which simultaneously advanced the

modernity of technology and tamed the disruptive force of liberatory promises. Through this obfuscation, the ideological architecture of the nineteenth century was established and provided the overarching political rhetoric that remains fundamental to this very day.

Additionally, as the geoculture of the world-system, centrist liberalism and the introduction of the concept of the Citizen becomes hegemonic across the world-system. Yet, in order to further understand this contradiction of liberalism, there is a need to dive deeper into the construction of not just the concept of the Citizen, but also that of “peoplehood” and the “nation”. The following subsections will bring to focus how Wallerstein has discussed the discursive construction of each concept and the role they play in maintaining the capitalist-world economy and the influence such has had on racial ideologies. Each of these concepts are fundamental to understanding the role of geoculture and the contradictory nature of liberalism.

## 5. Constructing the ‘Citizen’ and the Structures of Knowledge

In the previous Chapters, I examined Wallerstein’s account of the emergence of the modern world-system, emphasizing the co-constitution of its economic, political, and cultural pillars. Central to this analysis was the *longue durée* structure of the capitalist world-economy and its axial division of labour, framed through Braudel’s conception of the *économie-monde*. The modern world-system, arising in the “long sixteenth century,” is defined by enduring structural rhythms and spatial hierarchies of core, periphery, and semi-periphery. Accompanying this economic formation are ideological shifts, most notably European universalism and racial categorization, that stabilize and justify systemic inequalities. These frameworks operate in symbiosis, with universalism proclaiming inclusion and racial hierarchies rationalizing exclusion, together forming the cultural pillar essential to the reproduction of the system.

Building upon this foundation, the following Chapter traced the emergence of modern political ideologies in the wake of the French Revolution, where the contradictions of the capitalist world-economy manifest in two competing modernities: the modernity of technology and the modernity of liberation. These tensions are mediated by a centrist liberal geoculture that universalizes the promise of emancipation while delimiting it through constructs such as the Citizen, whose rights are framed as universal yet conditioned by moralized and racialised exclusions. Within this contradictory terrain emerge the overarching contemporary political ideologies: conservatism, liberalism, and socialism. Each of these political ideologies are contending over the right of who has claims to sovereignty and the legitimacy to direct social change.

The intentions of Chapter 5 are to go further into the construction of the Citizen by focusing on the exclusionary practices of citizenship and the epistemic structures which support such exclusions. Section 5.1 brings attention to the manner in which the discursive production of the concept of the Citizen becomes a site in which the contradictions of the two modernities become sedimented. Not only does the concept promise universal rights but becomes a battleground for supposedly justified exclusions based on class, gender, and race. The intentions of Section 5.2 are to expand on the structures of knowledge which emerge as an epistemic structure of justified exclusions.

### 5.1. The ‘Citizen’

One of the most significant symbolic contributions of the French Revolution was the discursive construction of the “Citizen”. This concept signified a repudiation of

traditional hierarchies and embodied the promises of the modernity of liberation, though always constrained by the realities of the modernity of technology. From the nineteenth century onward, the figure of the Citizen became so deeply entrenched that, by the latter half of the twentieth century, the guarantee of rights to citizens had become the minimal criterion for defining a modern democratic state, a claim virtually every state now professed to uphold (Wallerstein 2003).

The centrist liberal agenda and the concept of the Citizen are inseparable from the geoculture of the world-system. As previously outlined in Chapter 4, geoculture refers to the overarching cultural framework that legitimizes and sustains the capitalist world-economy, shaping the ideas and practices through which individuals and groups comprehend their roles. This geoculture, while originating in Europe, attained hegemony across the entirety of the system. The spread of the modernity of liberation promoted by liberalism was not confined to France but rapidly became a global phenomenon. Among the enduring legacies of the French Revolution was the normalization of social change, a characteristic seldom contested, though the question of who possesses the authority to direct such change remains deeply disputed. This tension becomes crystallized in the figure of the Citizen, which stands as the embodiment of the geocultural logic of the modern world-system.

Much of this problematic lay in the fact that the influence of the modernity of liberation was so pervasive that claims of citizenship threatened the overall stability of the capitalist world-economy. “In most cases, more than 90 percent of the residents of the country were citizens” (Wallerstein 2003: 650). Within the capitalist world-economy, this threatened the continual extraction of surplus value. The more inclusive citizenship was, the more of a threat this posed to the accumulation of capital. This threat of the mass populace threatening the extraction of capital set the foundations of the nineteenth and twentieth century debate on how to define citizenship in a way that would diminish such a threat. This gives rise to a very pertinent dilemma; how can a society come to claim universal rights of Man and Citizen yet, by necessity for the function of the capitalist world-economy, exclude so many?

In order to understand this contradiction, there is a need to understand not just the construction of the Citizen but also the construction of “peoplehood”. These two constructs are intimately related. In fact, peoplehood can help define who is worthy of the title of Citizen. As Wallerstein (1987: 380) describes,

“To start with the literature of the historical social sciences, one must note that the term ‘people’ is actually used somewhat infrequently. Rather the three commonest

terms are ‘race’, ‘nation’, and ‘ethnic group,’ all presumably varieties of ‘peoples’ in the modern world [...] a race is supposed to be a genetic category [...] A ‘nation’ is supposed to be a socio-political category, linked somehow to the actual or potential boundaries of the state. An ‘ethnic group’ is supposed to be a cultural category, of which there are said to be certain continuing behaviours that are passed from generation to generation and that are not normally linked in theory to state boundaries”.

According to Wallerstein, there are primary identities when discussing ‘types’ of people: ‘race’, ‘nation’, and ‘ethnic group’. ‘Race’ is claimed to be a genetic category and has a visible physical form which can be readily observable. Within the world-system, race emerges as a mode of expressing and sustaining the core-periphery antimony and the axial division of labour (385). A ‘nation’ is a socio-political category which is linked to boundaries of a state. Within the boundaries of nations, nationalism is intended to reinforce the states authority through invoking a status-group identity (Wallerstein 2011: 54). Furthermore, while race is the economic structuring of the world-system, the nation is the political structuring (Wallerstein 1987: 383). An ‘ethnic group’ is a cultural category which designate certain continuing behaviours connecting generations and may be linked to state boundaries (385). While there is only one nation within a state, there are multiple ethnic groups and races.

Each of the supposed types of “peoples” are constructed identities used to explain ‘why things are the way they are’ (Wallerstein 1991; 1987). Those who use these terms claim that they indicate some persisting phenomenon which supposedly influence their current behaviours. Certain ‘people’ are said to act in certain ways because of their biological, cultural, and historical pasts. As Wallerstein (1987: 380-381) states,

“the whole point of these categories seems to be to enable us to make claims based upon the past” to make sense of the present [...] Pastness is a mode by which persons are persuaded to act in the present in ways they might not otherwise act. Pastness is a tool persons use against each other. Pastness is a central element in the socialization of individuals, in the maintenance of group solidarity, in the establishment of or challenge to social legitimation. Pastness therefore is pre-eminently a moral phenomenon, therefore a political phenomenon, always a contemporary phenomenon [...] The past is normally considered to be inscribed in stone. The social past, how we understand this real past, on the other hand, is inscribed at best in soft clay”.

This notion of pastness becoming embodied within the concept of peoplehood is especially important due to the effects of the *longue durée* structures of the capitalist world-economy. By the nineteenth century, capitalist exploitation and the core-peripheralization had already wreaked havoc across the world-system over 200 years. Such denigration becomes an observable justification for claims of objective difference. As Wallerstein (1987: 383-386) summarizes,

“As the capitalist world-economy expanded from its initial location primarily in Europe, as concentrations of core and peripheral production processes became more and more geographically disparate, "racial" categories began to crystallize around certain labels. It may be obvious that there are a large series of genetic traits that vary, and vary considerably, among different persons. It is not at all obvious that these have to be coded as falling into three, five, or fifteen reified groupings we call ‘races’. The number of categories, indeed the fact of any categorization, is a social decision. What we observe is that, as the polarization increased, the number of categories became fewer and fewer. When W. E. B. Du Bois said in 1900 that ‘the problem of the twentieth century is the problem of the colour line,’ the colours to which he was referring came down in reality to white and non-white [...] This therefore provides legitimation to the hierarchical reality of capitalism that does not offend the formal equality before the law which is one of its avowed premises [...] peoplehood, resolves one of the basic contradictions of historical capitalism – its simultaneous thrust for theoretical equality and practical inequality – and it does so by utilizing the mentalities of the world’s working strata”.

The previous rationalities extending from European universalism of so-called ‘barbarians’ became attributed to people’s racial and ethnic categories. The result of which further justified and entrenched the economic and political hierarchies within the world-system. A history of exploitation becomes the justification for present and future exclusion. Furthermore, the separation into distinct racial categories that genetically differentiate those who are morally and culturally different allowed for the possibility of justifying political exclusion for not just the present generation but also future generations. Whilst the concept of peoplehood was fundamental to differentiate between who could make claims to inclusion within a nation and, therefore, the possibility of citizenship, there were further division between ‘types’ of citizens. The growing groups of citizens and working class antisystemic movements gaining power pushed the necessity to differentiate

between various forms of citizens (Wallerstein 2003). An answer to such a dilemma was posed by Abbé Siéyès just after the fall of the Bastille in 1789 who concluded that there must be two different types of citizens: passive and active citizens. Wallerstein (2003) reminds us of Siéyès conclusion,

“All inhabitants of a country should enjoy in it the rights of passive citizens; all have the right to the protection of their person, of their property, of their liberty, etc. But all do not have the right to play an active role in the formation of public authorities; all are not active citizens. Women (at least at the present time), children, foreigners, and those others who contribute nothing to sustaining the public establishment should not be allowed to influence public life actively. Everyone is entitled to enjoy the advantages of society, but only those who contribute to the public establishment are true stockholders (*actionnaires*) of the great social enterprise. They alone are truly active citizens, true members of the association” (Siéyès cited in Wallerstein 2003: 651-652).

In October of 1789, this conceptualization was solidified in political discourse with the National Assembly proclaiming that in order to become an active citizen, there was a necessity to pay three-days wages whilst also owning property. Of course, this also inherently benefitted those within the wealthy strata. There were certainly many other different constructions of antimonies to attempt to circumvent the universal application of sovereignty and rights into the mass populace. In fact, this contradictory form of European universalism has been in place (in varying forms) to justify inequality since the beginning of the world-system. As Wallerstein (2003: 652) expands,

“When inequality was the norm, there was no need to make any further distinction than that between those of different rank, generically between noble and commoner. But when equality became the official norm, then it was suddenly crucial to know who was in fact included in the “all” who have equal rights, that is, who are the “active” citizens. The more equality was proclaimed as a moral principle, the more obstacles - juridical, political, economic, and cultural - were instituted to prevent its realization. The concept, citizen, forced the crystallization and rigidification - both intellectual and legal - of a long list of binary distinctions which have formed the cultural underpinnings of the capitalist world-economy in the nineteenth and twentieth centuries: bourgeois and proletarian, man and woman, adult and minor, bread-winner and housewife, majority and minority, White and Black, European

and non-European, educated and ignorant, skilled and unskilled, specialist and amateur, scientist and layman, high culture and low culture, heterosexual and homosexual, normal and abnormal, able-bodied and disabled, and of course the ur-category which all of these others imply - civilized and barbarian”.

This passage calls attention to the epistemological, structural, and cultural shift from a society that was not mandated to justify inequality to one that proclaimed. The result of this shift led to the need for clear distinctions about who is included in the group enjoying equal rights, specifically the “active” citizens. As equality became an official moral principle, obstacles emerged to its actual realization, creating rigid distinctions. These distinctions, both intellectual and legal, formed the cultural foundations of the capitalist world-economy in the nineteenth and twentieth centuries. They include dichotomies such as bourgeois vs. proletarian, man vs. woman, White vs. Black, and many others, culminating in the fundamental division between the “civilized” and the “barbarian”.

Each of these divisions served as a mode of exclusion from dictating the direction of change in a society with the intention of ensuring that the modernity of technology and the expansion of the capitalist world-economy would continue on unencumbered. However, as previously stated, there was the continual push from the working class to gain the status of full citizenship. Yet, the working class were not the only populations excluded from access to full citizenship.<sup>8</sup> Wallerstein (2003: 656) reminds us of Joan Wallach Scott’s comments

“The French Revolution appealed to nature, which was a universal phenomenon, belonging to everyone. But it also appealed to virtue, which was only a potential (but not necessarily the actual) characteristic of everyone. From these concepts, it derived the existence of human rights. Since there could be multiple capacities and then for some multiple ‘natures’, the discourse had an ‘ambivalent quality’. Scott sums up ‘the persistent question of the relationship of the specific, marked groups to the embodied universal’ quite well: ‘how could the rights of the poor, of mulattos, blacks, or women be figured as the rights of Man? The general answer is: with great difficulty”.

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<sup>8</sup> These movements primarily took two forms: antisystemic and integrationist. The antisystemic movements sought to abolish the historical system in place that led to the conditions of inequality whilst claiming equality. Integrationists sought to speed up the process of integration into the system that would award them rights (Wallerstein 2003).

In regard to the women's suffrage movements early attempts to gain political rights, Wallerstein brings attention to comments made in the late eighteenth century by The Committee on Public Safety and Andre Amar's conclusion. Specifically, the claim that women did not have 'the moral and physical qualities' to exercise political right (654). Again, the appeals to universally inclusive politics lay were denied by the particularist understandings of who was virtuous enough to dictate change in society. Yet, despite such exclusions, the persistence of the movements was able to instigate minor concessions from the ruling strata, often in the form of introduction to the educational realms in order to improve their "moral education" (654-655).

From a racial perspective, Wallerstein contends that "the story of the Blacks was not too different" (654). Within the world-systems framework, this story is reduced to the integration of lesser status-groups striving for inclusion into the political realm. Such inclusion would also then imply a diminishment of the economic exploitation inherent in the capitalist world-economy. Yet, as previously discussed, European universalism had been in place since the origins of the world-system which proved to be a continual hinderance to inclusionary politics. As Wallerstein (2003: 670) summarizes,

"If citizenship - that is, active citizenship - was difficult to achieve for workers and women, it was even more difficult for persons of colour (or other groups defined by some status-group characteristic and treated as somehow inferior). The intellectual justification for this had been building up since the beginning of the capitalist world-economy. But it was only in the nineteenth century that the theme of superior and inferior 'races' was constantly elaborated and considered by Whites to be virtually self-evident. The racial divide was made almost inevitable from the beginning by the forms in which class ideology evolved".

Wallerstein draws attention to how sex, ethnicity, and race are divisive tools that is utilized by higher status-groups for their inclusion predicated upon another's' exclusion, "as if there were not enough room on the ship for everyone" (669). For example, Wallerstein (2003) contends that social/labour movements were hesitant to accept the women's suffrage movements. Within the suffrage movements, there was hesitancy to accept the racial/ethnic movements (669). Each exclusion restructuring the hierarchies of humanity until the class divisions of the capitalist world-economy became blurred behind the prejudice of another's sex, culture, or race. Each movement becoming further homogenized with every division.

Finally, what is still left to explore is the relationship between peoplehood, racism, and national identity. As previously stated, Wallerstein (1987) conceptualizes nationalism as intended to reinforce the supposed boundaries between different states which is done through invoking a status-group identity (380). Yet, what is the function of nationalism within the world-system? As Wallerstein (1987: 384) states,

“Why should the establishment of any particular sovereign state [...] correspond with a "nation," a "people"? This is not really difficult to understand. The evidence is all around us. States in this system have problems of cohesion. Once recognized as sovereign, the states frequently find themselves subsequently threatened by both internal disintegration and external aggression. To the extent that "national" sentiment develops, these threats are lessened. Governments in power have an interest in promoting this sentiment, as do all sorts of sub-groups within the state. Any group who sees advantage in using the state's legal powers to advance its interests against groups outside the state or in any sub-region of the state has an interest in promoting nationalist sentiment as a legitimation of its claims [...] Nationalism is the expression, the promoter, and the consequence of such state-level uniformities [...]”.

For example, if we were to look at the United States, which Wallerstein claims was the dominant hegemon within the world-system until the late twentieth century, American occupies a status-group claim amongst other nations. It homogenizes the nation itself and their national (economic and political) interests abroad. The belief in one nation being superior to another is a form of hierarchicalisation that places the influence of one over another. However, there is also a hierarchy within the nation. This may be class based, ethnic, or racial. In other words, historically, White American (men) have held the highest status-identity (especially if wealthy).

In this way, the concepts of citizenship and peoplehood within the world-system are not only deeply interconnected but also serve to perpetuate the Janus-faced nature of liberalism within the modern world-system. They both reflect and reinforce the structural inequalities of the world-system, providing a veneer of equality and inclusion while maintaining the underlying forms of exclusion and exploitation necessary for the capitalist world-economy to function unincumbered.

In summary, the French Revolution symbolically inaugurated the “Citizen” as a discursive figure of the modernity of liberation, even as actual political and economic inclusion remained exclusionary to support the modernity of technology. While citizenship

promised universal rights, its expansion threatened the capitalist world-economy, which depended on systemic exclusion. To resolve this tension, distinctions between active and passive citizens created a rhetorical commitment to equality that concealed material hierarchies. Centrist liberalism as the geoculture of the modern world-system constructed and institutionalized liberal norms through binary distinctions such as man/woman, White/Black, bourgeois/proletarian which served to naturalize inequality and moralize exclusion. These binaries underwrote the formation of status-groups, which pursued claims to inclusion by positioning themselves over others, reinforcing the system's hierarchies.

Through the construction of peoplehood (race, nation, and ethnicity) unequal citizenship became justified and legitimated. Race functioned as the economic logic of hierarchy within the capitalist world-system, while nation and nationalism organized political loyalty and state sovereignty, masking internal stratifications and securing hegemonic states from critique. The deployment of pastness stabilized these categories, allowing exclusion to be cast as historical inevitability or cultural deficiency. Even antisystemic movements, while challenging dominant exclusions, often reproduced others by privileging particular status-group claims. As a result, the interplay between citizenship and peoplehood became a key mechanism for resolving liberalism's core contradiction: how to sustain structural inequality within a normative framework of universal equality.

The final point yet to be discussed is fundamental to these constructed and exclusionary categories: the structures of knowledge. The modern world-system and the centrist liberal geoculture depended not only on political and economic institutions but also on epistemological regimes that rendered its hierarchies intelligible, natural, and moral. Disciplines such as history, anthropology, and social sciences helped enshrine the categories of race, nation, and citizenship as objective and self-evident, while obscuring their constructed and contextual origins. These structures of knowledge functioned as a meta-level of legitimation, embedding the geocultural assumptions of the modern world-system into the very frameworks used to interpret it. In doing so, they enabled the reproduction of inequality not only through policy and law but through the authoritative production of meaning and knowledge.

## 5.2. The Structures of Knowledge and the Prison of the Mind

As previously discussed in Section 3.2, during the early formation of the world-system and the emergence and expansion of the capitalist world-economy, a fundamental epistemic shift also occurred. Located firmly within the cultural pillar of the world-system, the overarching ideology of European universalism emerged alongside anti-universalist racist and sexist ideologies. For Wallerstein, universalism is not merely an abstract ideal

but a practical ideology underpinning the intellectual architecture of modernity. It operates by asserting that there exists universal truths about the world which can come to be known. Such truths were presumed to be independent of historical, cultural or moral contexts, despite being profoundly influenced by each. This framework enabled Europe to construct and impose a hierarchy of knowledge that elevated Western scientific rationality above other ways of knowing.

This epistemic shift facilitated the rise of a distinctly modern form of epistemological power, wherein European modes of knowing were institutionalized as both superior and universal. Such universalism justified domination not only economically and politically but also intellectually, rendering non-European knowledges as inferior, premodern, irrational, or in need of correction. Through the construction of antinomies, Wallerstein demonstrates how such epistemological dominance served colonial and capitalist interests through the classification of non-White and non-European peoples as ‘barbarians’, ‘uncivilized’, Other, or simply ‘less than’. Consequently, European universalism became the overarching legitimating structure that shaped, justified, and masked the ideological, structural, and physical violence of the modern world-system. As such, Eurocentric hierarchies were embedded within the architecture of the world-system and the very categories of knowledge and truth.

Additionally, drawing attention back to the discussion thus far in Chapter 5, there has been an emphasis on the political relevance of European universalism. Centred on the constructed concepts of peoplehood and the Citizen, the reflection showed how such categorization functioned as a central mechanism, in the reproduction of structural inequality and political exclusions within the capitalist world-economy. While centrist liberalism and the Citizen offer the façade of universal inclusivity and the emancipatory ideals of modernity, they have historically served to legitimize exclusions through racialised, gendered, and class-based hierarchies within and between nation-states. At the heart of this paradox lies liberalism’s foundational contradiction: the simultaneous invocation of universal rights and the systemic limitation of their application to maintain economic dominance. Furthermore, with centrist liberalism ascending to hegemonic status as the geoculture of the world-system, this foundational contradiction is not confined to European borders but is adopted across the world-system.

Yet, this contradiction cannot be sustained by political discourse alone. It requires deeper ideological support – an epistemic infrastructure capable of rendering inequality not only permissible but rational, moral and even inevitable. This leaves us to the final and perhaps most insidious mechanism of legitimation within the cultural pillar of the world-system: the structures of knowledge. These intellectual formations, emerging from and

shaped by European universalism, did not merely reflect the world-system, they helped constitute it. Through disciplinary practices, normative assumptions, and interpretive frameworks, modern knowledge systems encoded and disseminated the very antinomies that underwrote liberalism's Janus-faced geoculture.

The discussion that follows turns to this epistemological terrain, drawing on Wallerstein's insights to expose how the liberal project of universal human rights has always been mediated, and ultimately constrained, by racialised and gendered epistemic regimes. This section aims to explore further into the structures of knowledge that have historically legitimized European colonialism, Western expansion, and the construction of Otherness - processes that underpin exclusionary political practices even as they are framed in the language of universal inclusivity. This contradiction is concealed through the co-constitution of supposedly opposing concepts: unity and diversity, universalism and particularism, humanity and race, world and nation, person and man/woman. Each of these antinomies have been strategically constructed to sustain the world-systems ideological coherence and supported through the structures of knowledge which profoundly influence the way we see the world. As such, to understand the contradictory and Janus-faced nature of liberal politics within the world-systems framework, we must go further into what has been poetically referred to as the 'prison of the mind'.

Within the world-systems framework, the cultural pillar is the least examined area. As previously stated, culture is the "idea-system of the world-system [and] is the outcome of our collective historical attempts to come to terms with the contradictions, the ambiguities, the complexities of the socio-political realities of this particular system" (Wallerstein 1990: 38). Despite critiques levelled at W-SA for ignoring culture, there is extensive recognition of the importance and influence of the cultural arena across the entirety of the world-system. Such importance is reflected in Wallerstein's (1990a; 1990b) statement, "culture is the world-system" and it is the central arena for the replication of dominant ideological struggles. Culture is the battleground which constrains, confines, and defines what is possible for political and economic change. Culture is what shapes our realities and, consequently, sets the terms for agency.

From early essays on universalism (Wallerstein 1990) to his late reflections on the future of the social sciences (Wallerstein 2001), he insists that modern power is secured as much by epistemic authority as by markets, political alliances, or physical domination. Wallerstein (1991; 2004) repeatedly warns that without bringing this cognitive architecture into the analysis, any account of capitalism's structural durability remains only partial. The world-system cannot be fully understood with reference to a singular pillar of the world-system, but in relation to each primary pillar of the economic, the political, and the

cultural. Building upon this reflection and our previous discussion in Chapter 3.2, we can expand further on the epistemic rupture that coincides with the emergence of the capitalist world-economy that will remain to have a profound influence in contemporary political exclusions.

As previously stated, European universalism began to take hold as the overarching ideology of the cultural pillar of the world-system. The result of which created distinctions between the ‘human’ and the ‘sub-human’ or the ‘civilized’ and the ‘barbarian’. However, despite the overwhelming physicality in creating such antimonies, there remained a need for a legitimizing epistemological shift that could justify and solidify such a framework. Previously, humanity’s appeals to truth and certainty were grounded in either ‘magic or magicians, the gods and priests, collective or communal authority’ (Wallerstein 2004: 34). Despite the staunch belief in such authorities, they remained inherently flawed and prone to inaccuracies. With the growing investment in capitalist pursuits, there required a higher level of certainty to justify risk-taking enterprises. For Wallerstein (2004), it is the necessity for a higher level of epistemic security for capitalist venture that provided the social support for cognitive systems that held a higher accuracy. The result of which helped promote an evolving science which became known as “modern science”.

As Wallerstein (2004a: 2) summarizes,

“There arose [a] need to know how we know, and to debate how we may know. The millennial claim of religious authorities that they alone had a sure way to know the truth had been under challenge in the modern world-system for some time already. Secular (that is, nonreligious) alternatives were increasingly well received. Philosophers lent themselves to this task, insisting that human beings could obtain knowledge by using their minds in some way, as opposed to receiving revealed truth through some religious authority or script. Such philosophers as Descartes and Spinoza – however different they were from each other – were both seeking to relegate theological knowledge to a private corner, separated from the main structures of knowledge [...] While philosophers were now challenging the dictates of the theologians, asserting that human beings could discern truth directly by the use of their rational faculties, a growing group of scholars agreed about the role of theologians but argued that so-called philosophical insight was just as arbitrary a source of truth as divine revelation. These scholars insisted on giving priority to empirical analyses of reality”.

This shift from sacred to secular knowledge and from revealed truth to empirically grounded inquiry, marks the foundational moment when the modern structures of knowledge were forged in service of the emerging capitalist world-economy. Furthermore, Wallerstein's account shows that the decline of theocentrism did not leave a vacuum but rather opened space for new epistemic agents to stake their claims to be arbiters of truth: philosophers, historians, and anthropologists. In displacing religious authority, emerging thinkers from Descartes to Spinoza onward laid the groundwork for what would become "modern science," a body of methods and institutions that promised more reliable knowledge for navigating commercial risk, planning colonial and imperial ventures, and governing populations.

Yet for Wallerstein, this epistemological rupture did not just divide theology from the sciences but also philosophy from science. The scientific disciplines, grounded in empirical methods and claims to universality, were privileged as authoritative modes of truth-making, particularly for their utility in managing economic risk, standardizing measurements, and facilitating imperial and bureaucratic control. Philosophy and what came to be known as humanistic studies and the humanities, in contrast, sought meaning through moral reasoning.

"First, the philosophers attacked the meaningfulness of revealed truths (those that could be known only, or at least best of all, to priests and clerical structures). The philosophers insisted that all humans had the innate capability to reason individually and thereby perceive truth. To be sure, they acknowledged that this was not easy, and that some persons (namely, the philosophers) were able to do this much better than most. But the philosophers were primarily interested in denying the right of either religious authorities or political authorities to proclaim truths. One might say that is the primary cultural message of what we now call modernity, and that this message was more or less successfully translated into everyday belief over the past five centuries, and accepted by most people throughout the world. Science, as a cultural activity, represented further specification of the philosophers' claim to universal human rationality as the source of truth statements. The scientists raised the question, how do we know whether any given persons claim to have discovered the truth by reasoning is valid, especially given that there are multiple competing claims to the discovery of truth? The scientists answered that truth claims had to be validated by empirical evidence, which had to be collected in specific ways that could be replicated by fellow members of the scientific community" (Wallerstein, 2004a: 35-36).

The result of the two emerging fields of thought seeking to displace theological hegemony created a division between what came to be called the “Two Cultures” (Wallerstein 2004a). Wallerstein and Richard E. Lee (2004: 23-27), identify the rise of the “two cultures”, the institutional and epistemological split between the natural and modern sciences with philosophy and the humanities, as a defining feature of the modern world-system.<sup>9</sup> This division, rooted in the long transformation of knowledge under capitalist expansion from the sixteenth century, separated the universalizing, supposedly value-free logic of the sciences from the particularist, interpretive practices of the humanities. Far from being a neutral intellectual development, this bifurcation served the operational needs of the capitalist system by compartmentalizing knowledge in the service of governance, economic planning, and ideological legitimation.

Throughout the long sixteenth century to the Enlightenment, rapid expansion in each of the epistemic arenas found its most structural form when ‘objective scientific truths’ fully replaced hegemonic positioning of the not only theocentric knowledges but also institutions and positions of political influence. Consequently, the period of Enlightenment and the French Revolution become the historical pinnacle of the sedimentation of European universalism and the structures of knowledge within the political pillar of the world-system. Both structurally and discursively, the Revolution solidified centrist liberal geoculture as the hegemon of the world-system whilst the Declaration of the Rights of Man and the Citizen became a central political discourse to proclaim universal inclusion whilst continuing exclusionary practices.

Again, the geoculture of the world-system cannot be reduced to a set of rituals or beliefs but embodies the overarching moral and epistemological framework that justifies and sustains the world-system (Wallerstein 2011: 54). In this sense, the cultural-ideological discourse cannot simply be reduced to a political realm but are fundamental to how one views the world, engages with the world, and inversely, what is deemed capable within the world which proclaims such restrictions. Consequently, it defines not only the terms of liberation but also of confinement.

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<sup>9</sup> Wallerstein and Lee (2004c) extend this argument further by demonstrating how the modern division of knowledge became institutionalized within the structures of knowledge. They contend that the division of knowledge into disciplines (the natural sciences, social sciences, and humanities) was a structural development of the modern world-system which reflected and reproduced its hierarchies. While their analysis illuminates how the boundaries between disciplines were institutionalized to sustain the world-system’s epistemic order, such a discussion extends beyond the current focus. My concern here is not about the divisions within academia but highlighting how Wallerstein captures how the epistemological foundations of knowledge itself were articulated within racialised world-order to stabilize and make coherent the capitalist world-system.

For Wallerstein, the Citizen becomes a key site for showing how knowledge structures translate into political exclusion. In *After Liberalism* (1995), Wallerstein asks the deceptively simple question,

“[...] who has the right to exercise human rights? [...] It is not obvious that the correct answer is ‘everyone’? Not at all! In fact, absolutely no one has ever said this. For example, it is almost universally agreed that an infant does not have these rights, or at least not all of them, on the obvious grounds that an infant does not have the mental capacity to exercise them wisely or safely for himself and others. But if not infants, then what about successively the senile aged, mall children, sociopaths, felons? And thereupon the list may be extended ad infinitum: what about the young, the neurotic, the soldiers, the aliens, the uneducated, the poor, women? Where is the self-evident line distinguishing capacity from incapacity? There is of course no such self-evident line, and surely not one deducible from natural law. Thus, it is that the definition of the persons to whom these human rights apply is inescapably a constantly recurring, current political question. The definition of who has human rights is in turn closely connected with who may claim to exercise the rights of the people. And here enters another concept deriving from the French Revolution, that of the citizen” (150).

Wallerstein’s reflections on the contested category of the “Citizen” reveal the deep instability and political contingency at the heart of liberal “human” rights discourse. Despite universalist claims, the notion of who qualifies as capable of dictating the change in society has always been governed by exclusions rationalized through allegedly objective criteria such as capacity, civility, morality, virtue or rationality. Each of which are further empirically verified through the natural sciences or theorized as correct due to philosophical articulation. Within the pursuit of inclusive politics, divisive knowledge structures emerged to reduce the threat to the stability of the capitalist world-economy.

These epistemological markers of inclusion and exclusion are not neutral but deeply embedded in the racialised and gendered logic of European universalism. The Citizen, as a construct, emerges not as the embodiment of a universal human condition, but as a historically situated figure designed to stabilise the world-system in the wake of the tumultuous French Revolution by filtering out the “incapable” who are often referred to as the “dangerous classes” - a group that conveniently overlaps with those structurally marginalized by the capitalist world-system. Wallerstein thus exposes the ideological sleight of hand whereby liberal regimes proclaim universal rights while simultaneously

delimiting the boundaries of humanity. Furthermore, he considers this as a fundamental directive of the centrist liberal agenda and central to the geoculture of the world-system.

“The political project of the nineteenth-century liberalism for the core countries of the capitalist world-economy was to tame the dangerous classes by offering a triple program of rational reform: suffrage, the welfare state, and national identity. The hope and assumption of was that ordinary people would be contented by this limited devolution of reward and therefore would not in fact press for the fullness of their ‘human rights’. The propagation of the slogans – humans rights, or freedom, or democracy – was itself part of the process of taming the dangerous classes. The thinness of the social concessions bestowed upon the dangerous classes might have become more salient except for two facts. One, the overall living standards of the core countries were benefitting from the effective transfer of surplus from the peripheral zones. And the local nationalism of each of these states was complemented by a collective nationalism of the ‘civilized’ nations *vis-à-vis* the ‘barbarians’. Today, we call this racism, a doctrine explicitly codified in just this period in just these states, and which came to permeate profoundly all the social institutions and all public discourse [...] Who were the ‘barbarians’? The colonized peoples, to be sure. Blacks and yellows to Whites. The ‘East’ to the ‘West’. The ‘nonhistoric’ nations of Eastern Europe. The Jews to the Christians. From the beginning, the human rights of ‘civilized’ nations were predicated on the assumption that they were ‘civilized’. The discourse of imperialism was the obverse of the coin. The duty of the countries who asserted that they respected human rights was, therefore, to ‘civilize’ those who did not respect them, who has ‘barbarous’ customs, and who consequently had to be taken in tow and taught, as children might be taught. It followed that any ‘rights of peoples’ were reserved for a very specific peoples, and were not at all the rights of all the other peoples” (Wallerstein 1995: 152-153)

This ideological contradiction becomes more apparent when viewed through the political project of nineteenth-century liberalism, which sought to manage dissent and preserve order by selectively extending suffrage, welfare, and national identity to the “dangerous classes” within core capitalist states. As Wallerstein (2004; 2006) makes clear, the expansion of “human rights” in the core was always predicated on the exclusion of others; those deemed barbaric, backward, or uncivilised. The universalism of the modernity of liberation espoused by liberal geoculture was always a partial and strategic

universalism, one that legitimized domination by cloaking hierarchy in the language of Reason and inclusion. What emerges is not a contradiction to be resolved, but a structural feature of the capitalist world-system: the co-constitution of liberal rights and imperial rule, of citizen and non-citizen, of suffrage and suffering. Consequently, the very structures of knowledge that evolved around this, come to support this obfuscation.

Yet, there are serious consequences when there is a disjunction between the unfettered accumulation for the capitalist world-economy and the cultural-ideological realities which support such resource extraction and social domination.

“Structures of knowledge are of course an integral part of the cultural underpinnings on any historical social system. While there always exists a sort of internal logic of such structures, and therefore a somewhat autonomous intellectual trajectory, they are part of a larger structure, having to fit into the logic of this larger structure and constrained by the intellectual boundaries the larger system has put in place. Structures of knowledge are precisely that, structures, and as such they are brought into existence socially and can only survive socially if there continues to be long-term compatibility with the social environment” (Wallerstein 2004: 51).

What Wallerstein seems to conclude is that the structures of knowledge remain subservient to the dictates of the capitalist world-economy. To a certain degree, if there is some form of incompatibility, the intellectual boundaries shift to maintain relative stability for the world-system. This interdependence between the structures of knowledge and the material organization of the world-system reveals how deeply the production of knowledge is tied to the reproduction of inequality and power. The endurance of the *longue durée* structures of the capitalist world-economy do not solely rely on adapting economically to new technological innovations, but also on its capacity to reshape the ways in which the world is made intelligible. When crises arise, they are not simply met with structural reform but also epistemological recalibration.

The emergence of modern science itself discussed earlier in this chapter illustrates this point. According to Wallerstein (2004a), modern science arose as an epistemic response to the uncertainties generated by capitalist enterprise. In doing so, it reorganized knowledge to serve the practical requirements for more secure investments within the expanding capitalist world-economy. Yet, the capacity for readjustment is not infinite nor guaranteed. As previously discussed in Chapter 3, *longue durée* structures do go through crises and do have an end. What we must come to understand is that crises within the world system are not simply economic or political but also deeply cognitive. It reflects a

widening disjunction between the world as it is materially constituted and the categories through which it is understood. When knowledge can no longer reconcile the realities of domination with the ideals of universalism, the reproduction of the system falters. It is at this moment, the exhaustion of an epistemic legitimacy, that the realities of the capitalist world-economy are stripped bare for a new form of judgement.

In closing, the cultural pillar of the modern world-system cannot be disentangled from the epistemic ruptures that gave it form and secured its endurance. European universalism, co-constituted with racial and gendered particularisms, did not merely sanction economic and political domination but reordered the very architecture of knowledge itself. Through the institutionalization of the “Two Cultures,” the privileging of scientific rationality, and the relegation of moral and humanistic reasoning to a subordinate register, modern knowledge came to encode the hierarchies indispensable to the endless accumulation of capital. Liberal geoculture, crystallizing in the wake of the French Revolution, normalized these hierarchies by proclaiming universality while delimiting its reach through ostensibly objective metrics of capacity, civility, and virtue.

This is not a contradiction to be resolved but the constitutive logic of the modern world-system: universalism and particularism, liberation and domination, citizen and ‘barbarian’, co-constructed within an overarching ideology of European universalism. To reckon with this reality demands more than a critique of political forms or economic arrangements, it necessitates a confrontation with the epistemic architecture that renders hierarchy intelligible and natural. It is this architecture, the “prison of the mind,” that both contains and conceals the deepest violence of modernity and, as such, becomes the most critical site of struggle in overcoming the Janus-faced nature of liberalism and actualize the ideals of the modernity of liberation.

## 6. The Second World-Revolution: A Crisis of the System

In the previous Chapters, I brought into focus the importance placed upon the French Revolution for Wallerstein and world-systems analysis as a fundamental revolution of the world-system. The French Revolution (1789 and 1848) mark a pivotal moment when the two secondary connotations of modernity (technology and liberation) began to fuse in one overarching *Weltanschauung* (philosophy or view of life) and represent the first great political expression of the Enlightenment and the heart of Capitalist Modernity. The modernity of technology promoted further progress within the capitalist world-economy and, by extension, further entrenched economic exploitation. The modernity of liberation preached universal suffrage which would overcome such exploitation.

Within this context, three primary modern political ideologies emerge: conservatism, liberalism, and radicalism. While each of these three political ideologies were in contestation with each other over who is best suited to dictate social change, centrist liberalism proved to be triumphant. Centrist liberalism institutionalized the modernity of technology whilst preaching the modernity of liberation. Such a contradictory stance not only quelled revolutionary masses through access to citizenship and the rights which accompany such status but also discretely continued to entrench economic inequalities inherent to the capitalist world-economy. Consequently, obfuscations of the contradictory nature proved to be so successful that centrist liberalism gained hegemonic status as the geoculture of the world-system. Geoculture is defined as a 'set of ideas, values, and norms that were widely accepted throughout the system and that constrained social action thereafter' which emerges in post-1789 Europe (Wallerstein 2011: xvi).

Stemming from the centrist liberal geoculture of the world-system, one of the most influential concepts of the French Revolution, the Citizen, is discursively constructed and institutionalized. However, the liberatory promises of citizenship proved too influential as to threaten the overall stability of the capitalist world-economy. As a consequence, types of citizens were constructed as to differentiate those who were considered capable of dictating the change of society from those who could not or should not. The previous rationalities extending from European universalism were adapted to the constructed concepts of peoplehood, ethnicity, and nation. Dichotomous identities emerged to justify exclusions and exploitation in a society that proclaimed equality for all. Such identities include, but are not limited to: bourgeois vs. proletariat, man vs. woman, White vs. Black. Each of these reify the European universalist division between 'civilized' and 'barbarian' which was hegemonic early in the formation of the world-system.

Additionally, Chapter 5 further expanded on how European universalism, co-constituted with racist and sexist particularisms, became the central feature of the cultural pillar that stabilized the capitalist world-economy and supplied the geocultural stability of the modern world-system. By following the construction of the Citizen alongside peoplehood with further distinctions of race, gender, and ethnicity, the Chapter highlights how each of these metrics became fundamental the exclusionary practices of centrist liberalism. As a consequence, centrist liberalism represents a Janus-faced mediator between the modernity of technology and the modernity of liberation, where the universalist rhetoric was continually refined by criteria of capacity, civility, and virtue. Here, Wallerstein's analysis on structures of knowledge becomes essential by reflecting on the manner in which modern science and enlightenment discourses were foundational in the justifying exclusionary liberal practices. Consequently, when the world-system enters a state of crises, it is not simply economic or political, but epistemological. If the structures of knowledge do not adjust to meet the demands of the capitalist world-economy, this may signal a terminal decline of the current world-system and open horizons to envisioning a new world-order.

Throughout this chapter, I will discuss Wallerstein's' primary focus on the cause and impact of centrist liberalism losing hegemonic status within the West. This discussion is especially important considering the continual reference within world-systems discourse regarding the Second World-Revolution of 1968 as representative of the current crises which shakes the foundations of the entire world-system. Not only are there ripples across the economic arena, but the geoculture and structures of knowledge which maintained the coherence of the world-system were, and still are, fundamentally challenged.

Finally, there is an explicitly racial character to these events that, while Wallerstein alludes to, does not flush out in its entirety. As such, there is need to provide a further exegesis of Wallerstein's' foundations to reinterpret aspects of the world-system for race-critical researcher. The importance of which not only sets the foundations of the world-systems framework to address the current crises we face today but serves as a point of focus for this project. Section 6.1 focus on the historical decline of the hegemonic positioning of centrist liberalism, the United States as the hegemon, and how the ideals of the geoculture of the world-system are laid bare for their contradictions. Section 6.2 is intended to draw the entirety of the review thus far into a further coherent dialogue that is pertinent for this project. This section will conclude with a narrowed focus on how the concept of the

Citizen is fundamental to understanding the Janus-faced nature of liberalism and the world-system.

### 6.1. The Downfall of Centrist Liberalism

Much like the French Revolution marked turning points in the world-system, the 1968 Student Revolts in France hold a similarly transformative significance. Wallerstein argues that May '68 was not an isolated event but part of a global wave of unrest which signalled instability in the entirety of the world-system. While the French Revolution symbolized the rise of modernity (with its different connotations) and a shared geoculture, the revolts signalled their fragmentation. As Wallerstein (1989: 431) states,

“The revolution of 1968 was a revolution; it was a single revolution. It was marked by demonstrations, disorder, and violence in many parts of the world over a period of at least three years. Its origins, consequences, and lessons cannot be analysed by appealing to the particular circumstances of the local manifestations of this global phenomenon [...] As an event, 1968 has long since ended. However, it was one of the great, formative events in the history of our modern world-system, the kind we call water-shed events. This means that the *cultural-ideological realities* of that world-system have been definitively changed by the event, itself the crystallization of certain long-existing structural trends within the operation of the system”  
[emphasis added].

According to Wallerstein, the Revolution of 1968 is best understood as a singular global phenomenon that fundamentally alters the “cultural-ideological” landscape of the world-system. However, its significance extends beyond French political unrest to a broader and more global systemic transformation. The upheavals of 1968 exposed deep fractures within the capitalist world-economy and the limitations of existing antisystemic movements. The widespread rejection of U.S. hegemonic power, alongside critiques of Soviet collusion, signalled a loss of faith in the dominant geopolitical order. Furthermore, as the postwar boom began to wane, global inequalities which were structured by racial, colonial, and economic hierarchies became more glaring. In this sense, 1968 functioned as a crisis of legitimacy not only for the core states but the world-system itself and paved the way for new movements that sought to challenge not only economic exploitation but also racial and cultural domination. As Wallerstein (2004a: 84) summarizes:

“It was the combination of long-existing anger about the workings of the world-system and the disappointment of the capacity of the antisystemic movements to transform the world that led to the revolution of 1968. The explosions of 1968 contained two themes repeated virtually everywhere, whatever the local context. One was the rejection of U.S. hegemonic power, simultaneously with a complaint that the Soviet Union, the presumed antagonist of the United States, was actually colluding in the world order that the United States had established. And the second was that the traditional antisystemic movements had not fulfilled their promises once in power. The combination of these complaints, so widely repeated, constituted a cultural earthquake”.

Within this excerpt, there are two essential points which need to be unpacked. Not only are they essential to further recognizing the importance Wallerstein places within the economic pillar but also sets the foundations for the contemporary relevance and race-critical discussion to follow. First, the observance of the decline of the United States as hegemon of the world-system with Soviet acquiescence in that hegemony (Wallerstein 1989). Second, recognition that the second world-revolution was not simply a spontaneous moment but a culmination of ambitions, ideals, and frustrations which have evolved since the first revolution of the world-system and the unactualized promises of the modernity of liberation (Wallerstein 1991; 2004a). The following discussion will address each of these points in turn.

As previously discussed in Section 3.1, Wallerstein contends that the world-system operates as a capitalist world-economy, structured by a hierarchy of core, semi-periphery, and periphery states. At the core of this system is the hegemonic state, which exercises the most influential economic, political, cultural, and military control, maintaining dominance in a way that remains largely uncontested (Wallerstein 1984). Hegemony, in Wallerstein’s framework, is not merely about military superiority but requires economic superiority and ideological influence (Wallerstein 1991).

Following the devastation of the Second World War, the United States emerged as the ‘undisputed hegemon’ of the modern world-system. Unlike European powers, whose economies were severely weakened by the war, the U.S. expanded their industrial dominance, controlled global financial institutions, and established military superiority through creating an expansive network of alliances, including NATO (Wallerstein 2004a). The establishment of the Bretton Woods system in 1944 positioned the U.S. dollar as the global reserve currency, further reinforcing American economic positioning (Wallerstein 1984). Additionally, the Marshall Plan in 1948 allowed the U.S. to rebuild and integrate

Western Europe under its economic and political influence, ensuring that capitalist economies aligned with American interests (Wallerstein 1984; 1991).

Furthermore, the U.S. solidified its role as the hegemonic power not only through economic policies but also through cultural and ideological dominance. Through mass media, universities, and diplomatic influence, American liberal democracy and free-market capitalism were promoted as global norms, reinforcing U.S. leadership in the post-World War II through Cold War era (Wallerstein 1995). Indeed, the very word of “democracy” was co-opted across the West and the world-system with many claiming to be in favour of such an approach regardless of if they were truly democratic (Wallerstein 2010).

While supposed democratic ideals and centrist liberalism (geoculture) was expanding its hegemonic reach across the world-system, it appeared that the ideals espoused during the first world-revolutions anti-systemic movements were slowly being implemented internally. The U.S. attempted to minimize class conflict through economic concession to skilled and unionized labour forces whilst also trying to overcome overtly discriminatory practices through targeted policies such as the Voting Rights Act and desegregation of the desegregation. Furthermore, outside of the U.S., anti-systemic movements were making progress in achieving power within their own state structures. In Wallerstein’s (1989: 432) own words, there was a ‘gradual, relatively bloodless decolonization’ of Asia and Africa.

“In all parts of the world, these movements seemed to be achieving step one of the two-step program. In a vast northern area from central Europe to East Asia (from the Elbe to the Yalu Rivers), communist parties governed. In the pan-European world (Western Europe, North America, and Australasia), social democratic parties (or their equivalents) were in power, or at least in alternating power. In the rest of Asia and most of Africa, national liberation movements had come to power. And in Latin America, nationalist/populist movements gained control. The years after 1945 thus became a period of great optimism. The economic future seemed bright, and popular movements of all kinds seemed to be achieving their objectives. And in Vietnam, a little country struggling for its independence seemed to be holding the hegemonic power, the United States, in check. The world-system had never looked so good” (Wallerstein 2004a: 84).

The result of such external expansion of Western political and economic alliances and internal mitigation of unrest led to a period of relative stability in the 1950’s. To rephrase this period in relation to the two modernities, there seemed to be a dualistic

function of both the institutionalisation of the modernity of technology through technological innovation and economic expansion, whilst anti-systemic and left-leaning parties were being placed within positions of power, thus appealing to the modernity of liberation. Yet, Wallerstein (2003) argues that hegemonic power is cyclical and will inevitably decline.

Since the 1970s, U.S. hegemony has been in decline, challenged by economic competition from Europe and East Asia, financial instability following the collapse of the Bretton Woods system, and military overextension (Wallerstein 2003).

“Nonetheless, by the 1960’s, this pattern of successful ‘hegemony’ has begun to fray, in part because of its very success. The economic reconstruction of the U.S.’s strong allies became so great that they began to reassert some economic (and even some political) autonomy. This was one, albeit not the only, meaning of Gaullism, for example. The death of Stalin marked the end of a ‘monolithic’ Soviet bloc [...] The smoothness of the decolonization of the third world was disturbed by two long and draining anti-colonial wars in Algeria and Vietnam [...] Finally, the political ‘concessions’ of the 1950’s to ‘minority groups’ in the United State (and elsewhere in the Western world) accentuated expectations that were not in fact being met, either in the political or the economic arenas [...] the renewed ideological pressures that the powers attempted to reapply were now being placed on what was a more disabused world public opinion. This was the pre-revolutionary tinderbox in which opposition to U.S. hegemony, in all its multiple expressions, would explode in 1968 – in the U.S., in France, in Czechoslovakia, in Mexico, and elsewhere” (Wallerstein 1989: 432).

Through Wallerstein’s reflections and grounded in our discussion of the two modernities in the previous chapter, it begins to be clear that American hegemony was a general extension of centrist liberalism preached in the wake of the First World Revolution. There was an institutionalisation of the modernity of technology, which furthered technological innovation and economic expansion. Additionally, there was the appeal to the modernity of liberation, guised through inclusive citizenship and democratic ideals. Yet, the cultural-ideological glue which obfuscated the contradictions between the modernity of technology and the modernity of liberation was disintegrating.

It is here that we must refer to the second point of discussion, the recognition that the ideals of the modernity of liberation were not being met. Not only was the hegemonic positioning of the United States beginning to falter but the geoculture, the structures of

knowledge, and the narrowness of the concept of the Citizen were brought into question. As Wallerstein (1989: 431) states, the events of 1968 represent a watershed even in which the “*cultural-ideological realities* of that world-system were definitively changed by the event, itself the crystallization of certain long-existing structural trends within the operation of the system” [*emphasis added*].

As previously discussed in Chapter 3, Wallerstein places special emphasis on hyphens within his work. This instance is no different because for Wallerstein (1990a), culture is the ‘ideological battleground of the world-system’.<sup>10</sup> Not only is this represented with European universalism but how culture more generally is understood as constructing our realities and defining what constrains us. Such is further evidence by Wallerstein’s reference Sidney Mintz’s (1988) claim that, “it is not our human nature that is universal, but our capacity to create cultural realities, and then to act in terms of them” (cited in Wallerstein 1990a: 31).

Additionally, it is not only the cultural realities but also the ideological strategies which are changed. Again, Wallerstein (2004a) comes to view ideologies as more than a set of ideas or theories and more than a moral commitment to a worldview. Ideologies represent strategies/tactics in the political arena focused on dictating who is best suited to dictate change in society. Specifically, “alternative perceptions of social reality have very concrete consequences for the ability of contending classes to further their interests” (Wallerstein 1975: 367). As such, the hyphen in cultural-ideological realities comes to represent not only the dissolution of the constructed realities arising throughout the origins of the world-system through the nineteenth century but also the political tactics which were constructed in relation to such realities.

As previously discussed in Chapter 4, the nineteenth century gave rise to new forms of anti-systemic and nationalist movements which either sought to overcome oppression of the proletariat by the bourgeoisie or overcoming the oppression of the ‘underdog peoples’ by dominant groups. In each of their pursuits for relative equality, they were able to achieve state power. However, each, in their own ways, were not able to overcome the pervasiveness of economic inequalities inherent to the modernity of technology and the capitalist world-economy. As a consequence, the faith in the anti-systemic movements and the ‘old Left’ along with faith in the modernity of liberation began to disintegrate.

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<sup>10</sup> Despite claims levelled against Wallerstein for dismissing culture, there has been quite a lot of attention paid to the concept. Not only has there been a focus on the varying connotations/definitions of the concept, but also the relations of culture to the economic and the political pillars of the world-system. For specific responses, refer to Wallerstein (1990a; 1990b).

If we delve deeper, we can begin to see that the very idea of the Citizen, the mode in which the ideals of the modernity of liberation could reach the most vulnerable in society, was the constraint in question. Citizenship was becoming recognized as neither inclusive nor able to alleviate the pervasiveness of economic inequalities across the core, semi-periphery, and periphery. Citizenship was far narrower than promised. Despite the overall growth of the economy during the period of stability, the gap between the core and the periphery did not decrease but further expanded. Such is also the case within the core nations in which anti-systemic movements were not able to achieve the promises in which the modernity of liberation promised. True social change seemed out of reach for the 'dangerous classes'. The result of which led into questions regarding the efficacy of the anti-systemic movements of the now 'old Left'.

Wallerstein (2004a), aware of this growing disillusion, reflects on the types of social movements which began to emerge more emphatically around this period.

"The immediate effect of the world revolution of 1968 seemed to be a legitimization of left values, most notably in the domains of race and sex. Racism has been a pervasive feature of the modern world-system for all of its existence. To be sure, its legitimacy has been called into question for two centuries. But it was only after the world revolution of 1968 that a widespread campaign against racism – one led by the oppressed groups themselves, as distinguished from those previously led primarily by liberals among the dominant strata – became a central phenomenon on the world political scene, taking the form both of actively militant 'minority' identity movements everywhere and of attempts to reconstruct the world of knowledge, to make the issues deriving from chronic racism central to intellectual discourse" (Wallerstein 2004a: 85).

Not only is there a growing push against the complacency of centrist liberalism in achieving the modernity of liberation, but there is critical reflection on the emergence of anti-systemic movements targeting the justification system of exclusionary citizenship: race and gender. Each of which, are engrained into the colonial and capitalist structure of the world-system. Such a shift in the types of movements proved to be especially problematic for conservative politics. This is because 'geopolitical and economic issues are far easier to deal with'. In other words, it is far simpler to concede menial economic gains to anti-systemic movements than undermining the ideological coherence of the capitalist world-economy (Wallerstein 2004a: 85). If the cultural-ideological coherence of the system were to break down, the entire political and economic system comes under threat.

What seems most intriguing in this conclusion is a diffraction of the focus. Generally understood within the world-systems framework is that crises in the economic pillar can lead to political instability which draw back upon culturally constructed archetypes of which populations can be preyed upon to bring the world-system back into a state of relative stability (Wallerstein 2004a; 2004b). Yet, in this instance, the cultural-ideological underpinnings are being undermined on a global scale which leads to political instability of the core and threatens the stability of the entire capitalist world-system. This partial reversal is significant. Whereas previous crises of the world system emerged primarily from economic contractions that reverberated into the political and cultural spheres, the upheavals of 1968 firmly resonate within the cultural-ideological realm. The geocultural consensus forged in the nineteenth century, centrist liberalism's universalist promise of inclusion alongside the material expansion of the capitalist world economy, begins to unravel. The very epistemic and moral frameworks that once legitimized systemic hierarchies are now becoming the objects of critique. Antisystemic movements no longer seek mere incorporation into the structures of citizenship and the liberal state but begin to question the foundational categories themselves: nation, peoplehood, progress, and even the liberal conception of humanity.

The rise of identity-based movements in the wake of 1968 signals a profound shift in the terrain of struggle. Where the "Old Left" had sought liberation through state power and the redistribution of material resources, the "new movements" of race, gender, and (counter) culture exposed the exclusions inscribed within those very categories of emancipation. This transition from class based to identity cantered critique does not abandon economic questions but reframes them, situating exploitation within broader matrices of racial, sexual, and epistemic domination. In doing so, these movements destabilize the liberal geocultural claim to universality and force into view the colonial foundations of modern knowledge itself.

For Wallerstein, this transformation represents more than the fragmentation of political ideologies; it inaugurates a systemic crisis. The cultural pillar, once the least interrogated arena of the world system, becomes the primary site of contestation. The "prison of the mind" begins to crack. Yet, this also inaugurates a dangerous instability: the disintegration of ideological consensus without the emergence of a coherent alternative threatens not only hegemonic power but the very reproduction of the capitalist world-economy. In this sense, the world revolution of 1968 marks the beginning of what Wallerstein identifies as the terminal crisis of the modern world system, a prolonged epoch in which the contradictions of capitalism, liberalism, and European universalism can no longer be contained within the structures that once stabilized them.

It is within this contradictory terrain that the figure of the Citizen emerges as both the emblem and the containment of liberal modernity's promises. Constructed in the wake of the French Revolution as the juridical expression of universality, the Citizen was always predicated upon exclusions necessary for the coherence of the world-system. As centrist liberalism ascended to geocultural status within the world system, it universalized not humanity but a particular image of the human: rational, male, and White. Those who did not conform to this image were relegated to the status of 'barbarians', lacking virtue, or those in need of civilizing. This racialised and gendered delineation of subjecthood formed the colonial underside of European universalism, providing the epistemic and moral scaffolding for the expansion of the capitalist economy and the stability of the world-system.

The world revolution of 1968 forces this contradiction into the open. The uprisings of students and workers in the metropole reverberated across the global South, intersecting with ongoing anti-colonial struggles in Africa, Asia, and Latin America. These movements challenged not only the economic dominance of core powers but the very moral rhetoric of modernity, revealing that colonial hierarchies persisted beneath the progress of postwar decolonization. Identity-based movements refused mere incorporation into the liberal state and instead exposed the exclusions inscribed within its categories of emancipation. They reframed questions of exploitation within broader matrices of racial, sexual, and epistemic domination, making visible the colonial foundations of modern knowledge. Yet, this is not a problem that is confined to only the twentieth century but is representative of our current struggles in the twenty-first century. As Wallerstein reflects,

“Culturally, this is where we are today worldwide. We find ourselves in a conflict of mutual name calling in the ongoing struggle for control of resources and of institutions of knowledge. It is time we took stock and reflected on the philosophical premises of our scientific activity and the political context of the structures of knowledge” (Wallerstein 2004c).

This moment of mutual delegitimation exposes not only the fractures in political discourse but also the deeper epistemic fissures that undergird the geocultural coherence of the system itself. The categories which had once stabilized the world-system and the capitalist world-economy begin to lose creditability, and with them, the legitimacy of knowledge production. What is at stake is not simply a contest between competing political programmes, but a struggle over who is authorised to define rationality, to define reality, and/or to define humanity. The cultural pillar, which has long been tertiary within W-SA,

becomes a primary site of contestation as movements contest, delegitimize, and reconstruct the structures of knowledges' institutions and the philosophical premises in which they rest. The 'prison of the mind' which had been the obfuscating and underlying mechanisms of rearticulating hierarchies of power and difference are held to account for their gendered and racial foundations.

Taken together, the upheavals of 1968 mark a moment in which the limits of the categories that had long structured political belonging and legitimated economic inequality within the modern world-system become exposed. The ideals and rhetoric of the modernity of liberation and the appeals to inclusive citizens begin to falter once their racial, gendered, and colonial foundations are brought to face. What becomes clear in this moment is the promises of the modernity of liberation and the institutional form of citizenship begin to lose their stabilising capacity. The crisis that unfolds is, therefore, not only a political rupture or an expression of geopolitical realignment but a deeper destabilisation of the cultural-ideological and epistemic arrangements that had mediated the tensions between the two modernities.

Importantly, Wallerstein recognises the significance of this turning point and the extent to which 1968 unsettles the cultural-ideological coherence of the modern world-system. Yet, the events of this period also foreground the racialised character of the categories whose destabilisation he identifies. The fractures of 1968 make visible not only the constraints placed upon the universal rights of Man and Citizen and the institutions built upon such rights, but also the racial and gendered hierarchies that were imbedded within these formations from their inception. This raises questions regarding whether the conceptual tools and their definitions are sufficient to account for the racial, cultural-ideological, and epistemic dimensions of the rupture. Rather than stabilising the system, these categories are revealed to rest upon historical hierarchies that can no longer be obscured. What emerges is a need to reconsider the foundations through which the modern world-system has organized and justified economic positioning, political belonging, and the very terms of humanity itself.

## 6.2. Crisis of the World-System as a Contemporary Crisis

The preceding chapters have assembled, through an extended engagement with Wallerstein and W-SA, an account of the modern world-system as a totality whose economic, political, and cultural pillars are entangled to the point of co-constitution (Wallerstein 2004a). Within this totality, the contradiction between theoretical equality and practical inequality is not an anomaly to be explained away but the operative logic through which the system reproduces itself across the *longue durée*. From its emergence in the long

sixteenth century, the capitalist world-economy is entangled not only with the axial division of labour and its tripartite spatial hierarchy of core, semi-periphery, and periphery but with an ideological architecture through which that hierarchy is rendered intelligible and legitimate (Wallerstein 1974; 2011). It is here that European universalism and particularist ideologies emerge not as opposites but as what Wallerstein identifies as a symbiotic pair: whilst European universalism proclaims a commonality amongst all humanity, particularist ideologies serve the function of justifying which forms of humanity are to be exploited in the endless pursuit of capital (Wallerstein 1990). The right dosage of each, as Wallerstein reflects, is what makes the functioning of the system possible. It is this pairing, not as a contingent ideological convenience but as a structural requirement, that carries through the analysis of the chapters that follow.

The French Revolution marks the historical conjuncture at which modernity is established as the *Weltanschauung* of the modern world-system, and with it the tension between the modernity of technology and the modernity of liberation as its central cultural contradiction (Wallerstein 1992). It is in the aftermath of these events that the three political ideologies, conservatism, liberalism, and socialism, crystallise as reactions to the competing modernities, with each representing a different tactic for addressing the question of who should direct social change and on what terms (Wallerstein 1995). Centrist liberalism proves most effective as a mediating force in no small part because of its capacity to hold the two modernities in tension: preaching the modernity of liberation whilst institutionalising the modernity of technology, with the perceived radical claims of both the conservative right and the socialist left tempered within the centrist liberal framework (Wallerstein 1991; 1995). In this mediating function, centrist liberalism ascends to the status of geoculture, defined by Wallerstein as a set of ideas, values, and norms widely accepted throughout the system that constrain social action (Wallerstein 2011). In this constraining function it is entangled with the reproduction of the world-system, promoting the modernity of technology whilst proclaiming the universalist language of progress, Reason, and the Rights of Man (Wallerstein 1991; 1995).

The figure of the Citizen is the institutional condensation of this contradiction. Emerging through the Declaration of the Rights of Man and of the Citizen as the juridical expression of universal humanity, the Citizen immediately confronts the dilemma that Wallerstein identifies as liberalism's foundational problem: universal rights proved to be a linguistic mirage, because the moment citizenship threatened the stability of the capitalist world-economy by extending too far, criteria emerged that served to limit its reach whilst preserving its universalist rhetoric (Wallerstein 2003). The distinction between active and passive citizens introduced by Abbé Siéyès just after the fall of the Bastille is the earliest

institutional expression of this necessity (Wallerstein 2003). What the subsequent construction of peoplehood through the categories of race, nation, and ethnic group accomplishes is to provide the deeper ideological architecture through which that limitation is naturalised (Wallerstein 1987). Specifically, peoplehood resolves liberalism's core contradiction, its simultaneous thrust for theoretical equality and practical inequality, by encoding the history of exploitation and workforce hierarchisation that the capitalist world-economy has already produced into the apparently self-evident categories of racial and cultural difference (Wallerstein 1987). A history of exploitation becomes the justification for present and future exclusion. Significantly, this is registered not as a political decision but as the recognition of objective and pre-political fact (Wallerstein 2003).

Yet, the political management expressed through the geoculture and the figure of the Citizen cannot sustain itself through political institutions alone. It is entangled with an epistemic infrastructure through which, as Wallerstein insists, inequality is rendered not only permissible but rational, moral, and inevitable (Wallerstein 1991; 2004a). The structures of knowledge that emerge alongside the capitalist world-economy across the long sixteenth century and crystallise through the Enlightenment are not external to this infrastructure but constitutive of it. Consequently, the shift from theological to secular epistemic authority, and the institutionalisation of modern science as the privileged arbiter of universal truth, is entangled with a cognitive architecture in which the criteria of Reason, capacity, and civility through which the Citizen is delimited are registered as objective fact rather than political construction (Wallerstein 2004a). European universalism is not simply an ideology proclaimed from above but an epistemological order embedded in the very disciplines and categories through which the world is made intelligible (Wallerstein 1990; 2006). It is within this order, what has been referred to as the prison of the mind, that the categories through which the world-system organises belonging, capacity, and legitimacy are rendered natural and beyond contestation, constraining not only what is politically possible but what is cognitively thinkable (Wallerstein 1990a; 1990b).

It is the intersection of these three dimensions, the geoculture's mediation of the two modernities, the Citizen's management of the contradiction between theoretical equality and practical inequality through peoplehood, and the structures of knowledge within which the criteria of exclusion are registered as objective and natural, that constitutes the Janus-faced logic of the modern world-system. Each dimension is mutually conditioning with the others: the geoculture is entangled with the epistemic authority of the structures of knowledge through which its universalist claims acquire credibility; the

Citizen is entangled with the categories of race, nation, and peoplehood through which the threat of full inclusion is managed; the structures of knowledge are entangled with the political and economic hierarchies of the world-system whose observable inequalities their disciplinary frameworks then naturalise and reproduce (Wallerstein 1991; 2004a). Together, they compose not a contradiction that might be resolved through reform or inclusion but the very logic through which the world-system maintains itself across historical conjunctures. Antisystemic challenges are absorbed and legitimacy is reconstituted through the same universalist categories that those challenges expose (Wallerstein 1995; 2004a).

Yet, this is not a problem confined to the historical conjunctures examined across the preceding chapters. The contradictions that the geoculture of centrist liberalism was constituted to manage remain acutely present, and their intensification in the contemporary moment follows precisely the logic that the analysis of Part I would lead one to expect. As the structural pressures of the capitalist world-economy deepen and the persuasiveness of centrist liberal universalism erodes, the familiar categories of peoplehood, civilizational belonging, and racial capacity make a resurgence in an attempt at re-stabilising a system whose geocultural coherence can no longer be taken for granted. The era that Ayers (2023) identifies as one of rising and expanding authoritarian-right movements, regimes, and leaders across the globe is not, in this light, a rupture with the liberal democratic tradition but an expression of the tensions that tradition has always been constituted to contain.

That this attempt at re-stabilisation operates simultaneously across all three dimensions of the world-system is what gives the contemporary moment its analytical weight, for what is failing is not simply a political ideology but the geocultural coherence of the system itself. Since the Great Recession of 2008/9, the structural pressures of the capitalist world-economy have deepened and the persuasiveness of centrist liberal universalism has eroded, and it is within this conjuncture that the centrist liberal geoculture's absorptive capacity is breaking down: movements organised around the racial delimitation of political belonging are no longer contained at the margins but are operating within and through the mainstream institutions of liberal democratic states, and in doing so they are making visible the racial foundations that the geoculture was constituted to obscure. Racial violence has been measurably increasing across the United States, the United Kingdom, France, Germany, the Netherlands, Spain, and Italy (Bonilla-Silva 2000; Finchelstein 2019; Hope Not Hate 2023), and the language through which that violence is legitimated reproduces the racial hierarchies of the Citizen that the preceding analysis has traced. The consolidation of what Hope Not Hate (2024) identifies as the Radical Right is,

in this sense, not an intrusion from outside the liberal democratic tradition but a symptom of its internal contradictions surfacing.

Entire communities are described as poisoning the blood of the nation, populations framed as biological threats and foreign invaders, and what Wodak (2015) identifies as a fascist blood and soil rhetoric of civilizational loss has entered the discourse of governments and legislatures across the Western core (Lind 2015; Arnsdorf, Miroff & Dawsey 2024). At the level of the structures of knowledge, the categories of expertise, rationality, and legitimacy through which European universalism once organised authority are themselves openly contested. Trust in democratic institutions falls across the liberal democratic world, and the knowledge systems through which liberal societies rendered their hierarchies objective and natural are brought into question (Payne, Korzeniewicz & Silver 2020; Wallerstein 2004a). Together, these developments do not represent a departure from the logic of the modern world-system but its most transparent expression: the moment at which the Janus-faced nature of liberal democracy becomes most visible precisely because the mechanisms constituted to obscure it are failing.

What the analysis assembled across Part I has begun to make visible is that race is not an ideological supplement to economic exploitation but a foundational logic that cuts across the geoculture, the Citizen, and the structures of knowledge, and through which the Janus-faced nature of liberal democracy is organised and reproduced. Yet W-SA, in treating race as derivative of the capitalist world-economy, cannot adequately account for the depth and scope of the racial logics that its own categories have begun to expose. Wallerstein names the contemporary crisis as cultural-ideological, acknowledges the prison of the mind, and insists on the co-constitution of the three pillars, yet does not follow these insights to their conclusion: that the cultural-ideological crisis is itself racially founded, and that race cuts across the economic, political, cultural, and epistemic dimensions of the modern world-system not as a legitimating mechanism of the capitalist world-economy but as the foundational logic through which its contradictions are organised, obscured, and reproduced (Grosfoguel 2004; 2007; Castro-Gómez 2023; Sanderson 2005; Quijano 2000; Wallerstein 1987; 1991; 2004a). It is this conclusion that the analysis now turns to.

## Part II. Race as a Foundational Logic: The Historical, Epistemic, Political, and the Material Organisation of the Modern World-System.

Part I assembled an account of the modern world-system through a sustained engagement with the conceptual architecture of world-systems analysis, demonstrating how the organisation of the capitalist world-economy, the articulation of European universalism, the formation of liberal geoculture, and the construction of the Citizen operate together through structured relations of inclusion and exclusion. In doing so, it brought into view the ways in which these relations are organised through racial differentiation, not as an external distortion, but as embedded within the very terms through which the system operates. Part II takes up this problem through a sustained race-critical interrogation of W-SA, focusing on the question of race as it emerges from within the framework itself. The aim is not to displace or reject W-SA but to work through its conceptual limits by examining how race is accounted for within the framework, where it remains underdeveloped or largely absent, and how this affects the explanatory capacity of the framework as a whole.

The critiques levelled against W-SA on these grounds are not new, and the limitations its economically focused architecture imposes on the theorisation of race have long been recognised by those working within, against, and adjacent to the tradition (Grosfoguel 2004; 2007; Castro-Gómez 2023; Quijano 2000; Sanderson 2005). What Part II contributes is not simply a revival of these critiques but their deepening and extension, developing a race-critical engagement that brings the conceptual limits of W-SA more clearly into view whilst providing the basis for the theoretical reconstruction that follows in Part III. The orientation of Part II is intentionally diagnostic and elaborative rather than theoretically reconstructive, a task reserved for Part III. The chapters proceed from a position that takes the contributions of W-SA seriously whilst subjecting its treatment of race to sustained race-critical scrutiny, demonstrating that race is not merely an ideological supplement to economic exploitation but a foundational logic of the modern world-system, essential to understanding the Janus-faced nature of liberal democracy across its historical, epistemic, political, and material dimensions simultaneously.

Chapter 7 opens Part II by pressing directly into the question that Part I raises but cannot resolve on its own terms: how race is conceptualised within W-SA and what the consequences of that conceptualisation are for a race-critical account of the modern world-system. Through Stuart Hall's (1980) distinction between economic and sociological approaches to race, the chapter situates W-SA firmly within the economic camp,

demonstrating that Wallerstein's treatment of race as derivative of the capitalist world-economy imposes both a temporal and a conceptual foreclosure on the depth and scope through which race can be theorised within the framework. The chapter establishes that this is not an idiosyncratic weakness of Wallerstein's formulation but a structural limitation of the tradition as a whole, and it is this limit that the subsequent chapters press into.

Chapter 8 deepens the race-critical interrogation by turning to the structures of knowledge through which European universalism, the human, and the Subject are defined within the modern world-system. Wallerstein acknowledges the structures of knowledge as foundational to the geoculture of the world-system, yet his account situates their formation primarily at the moment when liberalism gains geocultural hegemony in the wake of the French Revolution. What this leaves undertheorised is the longer epistemic formation through which the structures of knowledge were racially constituted prior to and as the conditions of possibility for that moment. The chapter demonstrates that the displacement of theological authority by secular epistemic formations, and the consolidation of the Cartesian Subject and the invention of Man as the epistemic foundations of Western knowledge, are entangled with a racially particular conception of the human that presents itself as universal whilst embedding gradations of humanity within the very categories through which the world is made intelligible. In doing so, Chapter 8 establishes that race is not only codified within political institutions or economic relations but is constitutive of the structures of knowledge themselves, and that it is through these structures that the geoculture of the world-system acquires the epistemic authority through which racial hierarchy is rendered natural, legitimate, and beyond contestation.

Chapter 9 shifts the analysis from the epistemic to political discourse, tracing how the racialised foundations examined in Chapter 8 are translated into the liberal political tradition and operationalised within the figure of the Citizen. Through a sustained engagement with Hobbes, Locke, Rousseau, and Kant, the chapter demonstrates that liberal political discourse actively participates in racial hierarchy rather than simply inheriting a racially ordered world. Political capacity is conditioned upon criteria of rationality, moral development, and civic virtue that are formally universal whilst remaining racially organised in their operation. The liberal Citizen is built upon the racialised epistemic Subject established in Chapter 8 rather than displacing it, translating racial hierarchy into political differentiation and producing the foundational figure through which the Janus-faced nature of liberalism becomes politically operative within the modern world-system.

Chapter 10 extends the race-critical interrogation into the material organisation of space. The chapter argues that space is racialised and race is spatialised as a foundational and ongoing feature of the modern world-system rather than as a consequence of economic positioning, and that this mutual constitution cannot be adequately theorised within Wallerstein's account of space as a macro-structural map of the axial division of labour. Together, these four chapters hold the historical, epistemic, political, and material dimensions of race in relation through the logic of articulation (Hall 1980; Althusser 2001), demonstrating that race is embedded across the modern world-system not as a phenomenon reducible to any single pillar but as the foundational logic through which the contradictions of liberal democracy are organised, obscured, and reproduced.

## 7. Temporal and Conceptual Foreclosures: Challenging World-Systems Understanding of Race

In Chapter 3, the overall economic and cultural framework of W-SA formulated by Immanuel Wallerstein was presented. There are three fundamental points pertinent for our topic which were discussed. First, the modern world-system is a capitalist world-economy which emerges throughout the “long sixteenth century”, entrenches a tripartite axial division of labour, and became globalized by the nineteenth century. Second, emerging alongside, and fundamental to function of, the modern world-system, the overarching ideology of European universalism begins to supplant theological hegemony. This shift towards a universalist ontology, serves the function of justifying and rationalizing the economic exploitation inherent to a capitalist world-economy. Third, the anti-universalist and particularist racial ideologies emerge as both a signifier of economic positioning and a constraining cultural pillar to justify, maintain, and reproduce varying forms of economic exploitation.

The analysis developed throughout Chapter 6 demonstrated that the crisis of the modern world-system cannot be understood solely through economic relations that W-SA traditionally privileges. The destabilisation of the centrist liberal geoculture which began in the wake of the 1968 revolts, the erosion of the stabilizing function of the Citizen, and the exposure of the racial and colonial logics embedded within the structures of knowledge each highlight key contributions of Wallerstein and W-SA while also revealing limits within the current framework. Although Wallerstein insists that the modern world-system cannot be reduced to the economic pillar alone, the analytical design of his world-system nevertheless places causal primacy on the economic pillar. Consequently, racial formations tend to appear as secondary developments rather than as constitutive elements of the world-system itself. The problem that emerges is not that Wallerstein ignores race, but that the categories through which he interprets the world-system obscure the extent to which racialisation is essential to its foundations. While Wallerstein points to the fundamentality of race to the function of the world-system, we must still interrogate the manner in which race is conceptualized in W-SA.

Chapter 7 takes up this problem directly by further challenging Wallerstein and W-SA’s understanding of race and pushing the conceptual boundaries of the framework towards a race-critical perspective. More specifically, I intend to revive previous critiques of economic reductionism levelled against W-SA and move beyond them by solidifying how such a reduction is problematic for race-critical research. To frame this discussion, I would

first like to introduce a debate that Stuart Hall (1980) has very clearly brought into focus. I do so because the themes in what Hall considers the division between the ‘economic’ and the ‘sociological’ approaches to studying race, ethnicity, and “societies structured in dominance” are recurrent throughout this project. Specifically, the unresolved analytical differences between generally economic vs cultural approaches to the study of race and racism. In framing this discussion with Hall, I will draw attention to the manner in which Wallerstein’s understanding of race and racism is firmly within the economic approach and, as a result, yields a problematically economic reductionist understanding of race and racism.

### 7.1. The Economic and the Sociological Approaches to Race and Racism: Situating Wallerstein and World-Systems Analysis.

Stuart Hall (1980) has been quite attentive to the divide between what he considers the economic approach and the sociological approach to studying race and racism.<sup>11</sup> According to Hall, and very broadly speaking, economic approaches make a fundamental error in their theorizations by assuming “economic relations and structures to have overwhelming determining effect on the social structures of such formations. Specifically, those social divisions which assume a distinctively racial or ethnic character can be attributed or explained principally with reference to economic structures and processes” (Hall 2021: 196). In other words, the economic approach tends to reduce racial formations to derivative effects of material relations, treating them as reflections of class structure or the division of labour rather than as constitutive social logics with their own dynamics.

In contrast to the economic approach, Hall, again, very broadly speaking, conceptualizes the sociological approach. The sociological approach can be seen as a response to what they view as the economic reductionist accounts that employ a broadly materialist framework. The sociological approach stresses that race and ethnicity are specifically and fundamentally related to cultural features of social formations. The sociological (cultural) approach, in various ways depending upon the theorist/theory, contends that race and ethnicity cannot be explained or determined solely through the economic level. As such, race and ethnicity have their own autonomous structuration processes that economic relations cannot adequately account for (197).

As Hall (2021: 197) summarizes,

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<sup>11</sup> I would just like to call attention to the fact that Hall (2021: 196) considers the reductions of such fields into two categories rather ‘tendentious’ but necessary for the sake of general discussion on recurring problematics. Furthermore, and coincidentally, the reduction of many rich fields of academic research into two primary domains is representative of how Wallerstein comes to view his economic Marxist-Brauelian approach to that of the “post” approaches associated with cultural studies.

“[...] it can be seen how the two paradigms have been counterposed to one another, each correcting the weakness of its opposite. The first tendency, whether Marxist or not, gives an overall determinacy to the economic level. This, it is said, imparts a hard centre – a materialist bias – to the otherwise soft-centredness or culturalism of ethnic studies. The stress on the sociological aspects, in the second tendency, is then a sort of reply to this first emphasis. It aims to introduce a necessary complexity into the simplifying schemas of the economic explanation, and to correct again the tendency of the first towards economic reductionism. Social formations, the second tendency argues, are complex ensembles, composed of several different structures, none of which is reducible to the other”

Very often, these two perspectives are counterposed to each other, proclaiming analytical inadequacies across the aisle; the cultural approach accuses the economic approach as guilty of economic determinism whilst the economic approach accuses its counter as a cultural relativist. Hall’s insistence on recognizing the mutual insights and limitations of both economic and cultural paradigms underscores the need for a more balanced, integrative approach which does not merely reduce race to an epiphenomenon of class relations, nor treat it as purely a matter of cultural signification divorced from material realities. In this regard, we can begin to form a cohesive theoretical framework which allows us to see race not as purely material relations or cultural ideology, but as a structurally embedded, mutually reinforcing system that operates across multiple dimensions of the world-system.

What is decisive in Hall’s intervention is not simply the rejection of economic determinism or cultural relativism, but his insistence that race must be understood through the logic of articulation. For Hall, social formations are not governed by a single determining instance but are composed of multiple structured relations whose effects emerge through historically specific configurations. Race, in this sense, cannot be reduced to an economic outcome nor elevated to an autonomous cultural domain. Instead, it is produced through the contingent articulation of economic relations, political institutions, and cultural-ideological practices that together shape how inequality is organised, experienced, and contested. This perspective does not deny how fundamental material relations are, but it refuses to grant them explanatory primacy in advance. The importance of articulation, therefore, lies in its capacity to hold together the economic, the political, and the cultural without collapsing one into the other.

While Hall's work points toward the value of synthesizing these distinct levels of analysis, Wallerstein's formulation of W-SA has often aligned almost exclusively with only one side of the debate.<sup>12</sup> Wallerstein and world-systems analysts have very frequently and unapologetically placed themselves within the economic camp that is strongly associated with Marxist approaches and have been very aware of the critiques levelled against them from the cultural perspective. For example, Wallerstein (2004c: 101) states, "In the 1980s a second challenge to our work came from the broad current some call cultural studies and others post-modernism or post-other things". There are certainly instances throughout his work which such indifference and convenient reductions are made evidently clear (Wallerstein 1991a; 1991b; 1995; 2004a; 2006). In doing so, Wallerstein distances W-SA away from the claimed analytical faults of cultural studies and other 'post-things' without fully recognizing the contributions that could provide rich analytical terrain within W-SA, especially for race-critical research.

Despite there certainly being many disagreements between each approach that would extend well beyond the intentions of this discussion, I would like to first focus on the relationship between Wallerstein's pursuit of capitalist totality counterposed to the classic poststructuralist aversion to 'grand narratives' and economic determinism. Capitalist totality, according to Wallerstein, is referring to the modern world-system as a single, historically bounded social system whose economic, political, and cultural pillars are integrated in a manner that they are governed by the logic of endless accumulation of capital (Wallerstein 1974; 1983). Within this context, the three pillars of the world-system; the economic, political, and cultural do not have relative autonomy outside of the capitalist world-economy and both are derivative of the economic pillar. Consequently, the pursuit of capitalist totality pushes W-SA into the realm of grand narratives, which have been under attack since the rise of 'post' approaches in the 1960's.

Wallerstein (2004c: 101) both addresses and dismisses this central critique against Marxist approaches:

"World-systems analysis was said to be just one more 'grand narrative' to be cast into the dustbin, however recently it had been constructed. We may have been under the illusion that we were challenging the status quo of world social science; for these critics we incarnated that status quo. We were said to have committed the fatal sin of ignoring culture".

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<sup>12</sup> Despite their publications sharing similar timeframes, there is no direct discourse between the two theorists.

Rather pragmatically and very unapologetically, Wallerstein (2004a: 21) responds to such critiques by stating, “Yes, world-systems theory is indeed a grand narrative”. It is a grand narrative that can “reflect reality more than others” [emphasis added]. There is certainly truth to such a claim, especially when considering that Wallerstein has been quite attentive to the general inclusion of culture into his world-system. In fact, there is a rather insightful attempt to present the three primary pillars of the economic, the political, and the cultural in a manner that recognizes the fundamental nature of each, to the point of blurring the boundaries (Wallerstein 2004a; 1990). However, despite recognizing the co-constitution of the three pillars, there remains a reduction of the world-system as the economic having causal influence in the last instance.

What is decisive here is that Wallerstein himself insists that culture is a constitutive pillar of the modern world-system, even as he maintains the primacy of the capitalist world-economy as the organizing logic of the whole. This insistence creates a tension internal to his framework rather than simply a weakness imposed to the outside. W-SA does not deny the relevance of culture but consistently approaches it through an explanatory structure in which cultural formations remain intelligible in relation to economic processes. As a result, the question is not that whether culture matters within W-SA, but how far its significance can extend before it encounters the limits imposed from an economic approach.

This tension has also been acknowledged by scholars working at the intersection of W-SA and decolonial theory. Santiago Castro-Gomez (2005), for example, draws attention to the epistemological limits produced by the conceptual architecture of modern social theory, including W-SA, arguing that the reliance on macroeconomic explanation constrains how culture, knowledge, and historical difference can be theorized. While Castro-Gomez does not develop a race-centred critique in the sense pursued in this project, his intervention nonetheless exposes how an economic organizing logic can narrow the intelligibility of non-economic forms of power. What is significant for the present discussion is not that W-SA ignores culture, but that the treatment of culture remains conditioned by an explanatory structure in which economic relations necessarily retain interpretive priority.

A similar tension appears in Ramon Grosfoguel’s engagement with W-SA through the concept of coloniality. Grosfoguel (2002; 2008) is more explicit than Wallerstein in foregrounding empire, race, and colonial domination as constitutive dimensions of capitalist modernity. However, even here, race often appears as a mechanism through which global hierarchies are organized, rather than as an articulated formation operating

across economic, political and cultural domains simultaneously. While Grosfoguel's work significantly expands the analytical terrain beyond economic explanation, it does not fully dislodge the tendency to treat race as intelligible primarily through its relations to labour, accumulation, and colonial structures. This limitation is not a failure of intervention but an indication that the problem exceeds any single corrective move and requires a more systematic rethinking of how race is theorized within W-SA.

What matters for the present discussion is that Wallerstein's insistence on the inclusion of culture does not displace the explanatory priority of the economic pillar within W-SA. Even where cultural and ideological formations are acknowledged as constitutive of the modern world-system, they remain largely intelligible through their relationship to the capitalist world-economy. The concern, in other words, is not that W-SA ignores culture, but that it continues to approach cultural and epistemic formations through an explanatory framework in which economic relations remain constitutive in the last instance.

This tension becomes particularly salient when considering how race is positioned within W-SA. Wallerstein consistently locates race and racism within the cultural pillar of the modern world-system, treating them as a subcategory of the overarching ideology of European universalism which legitimates and stabilizes the axial division of labour (2004a). Race, in this sense, is not necessarily marginal despite its fragmented appearance. Yet its analytical status remained shaped by a broader economic orientation in which economic relations provide the explanatory horizon. As a result, race appears as a necessary cultural component of the world-system whose significance is grounded in economic structures in the last instance, rather than a structuring logic that cuts across the economic, political and cultural domains simultaneously.

What Wallerstein unapologetically defends, the grand theory of W-SA, is a crucial weak point in his theorizations. Most importantly, this quest for conceptualizing the world-system through the lens of capitalist totality overlooks Hall's call for the necessity of harmonizing the contributions of both economic and sociological (cultural) approaches for race-critical analysis. The result of which, is a world-system that understands race through a singular economic logic rather than a logic of articulation. Despite Wallerstein's recognition of this issue, there remains analytical indifference because of the claim of Wallerstein's account 'reflecting reality more than others'. It is this assumption which I wish to challenge. To do so, I will provide evidence of economic reductionism that dismisses historical and race-critical insights on the emergence and function of race within the world-systems framework that cannot be adequately accounted for within a purely economic approach.

## 7.2. Racialised Realities: Disrupting the Temporal and Conceptual Foreclosure

To clarify the limits of Wallerstein's and W-SA explanatory horizon, this section returns to several key claims discussed throughout Part I regarding race and racism within W-SA. These claims are central to how race is positioned within the world-systems framework and have been repeatedly invoked to explain its historical emergence, social function, and political significance. Rather than offering a comprehensive critique of W-SA, the aim here is to examine the explanatory capacity of these specific claims as they relate to the origins and operation of race within the modern world-system. Each claim is taken seriously on its own terms and placed in a dialogue with historical and race-critical scholarship in order to assess whether an account grounded in the primacy of the economic can adequately account for racial formation across the cultural and political dimensions of the system. In doing so, this section tests Wallerstein's assertion that W-SA reflects social reality more effectively than alternative approaches by evaluating how race is theorized, delimited, and explained within its conceptual architecture. Through this evaluation, I shall ultimately argue that the economic perspective of Wallerstein instigates both a temporal and conceptual foreclosure on the account of race which further directs us away from an economistic logic towards a logic of articulation.

To solidify and expand on this claim, I would like to recall several points Wallerstein has made which were discussed and place them in a dialogue with contemporary race-critical discussion on the emergence and influence of race and racism. To solidify and expand on this claim, I would like to recall several points Wallerstein has made which were discussed and place them in a dialogue with contemporary race-critical discussion on the emergence and influence of race and racism.

- (1) Race and racism are the "expression, the promoter, and the consequence of the geographic concentrations associated with the axial division of labour [...] Racial categorization arose primarily as a mode of expressing and sustaining the core periphery antimony" (Wallerstein 1987: 383-385).
- (2) The difference between racism and xenophobia is grounded in the "belief that superiority in characteristics relevant to economic performance" (Wallerstein 2011: 78).
- (3) "Racism was the mode by which various segments of the work-force within the same economic structure were constrained to relate to each other. Racism was the ideological justification for the hierarchicalization of the work-force and its highly unequal distribution of reward" (Wallerstein 2011: 78).

To begin, I would like to bring into focus Cedric Robinson's (1983) work. *Black Marxism: The Making of the Black Radical Tradition*, which poses a sustained challenge to the assumptions that underpin classic structural Marxism and its historical materialist orientation. Crucially, Robinson does not reject materialist analysis as such, nor does he deny the centrality of exploitation and domination in capitalist development. What he contests instead is the presumption that history becomes intelligible primarily through class struggle, or that capitalism represents a decisive rupture from previous social orders. His critique is directed at an inherently Eurocentric Marxist tradition that, in his view, reproduces a Eurocentric historical narrative by treating class formation as the primary motor of history and relegating race to a secondary or derivative position. As Robinson (1983: 3-4) states,

“The obscuring of the Black radical tradition is seated in the West's suppression of Europe's previous knowledge of the African (and its own) past. The denial of history to African peoples took time - several hundreds of years - beginning with the emergence of Western Europeans from the shadow of Muslim domination and paternalism. It was also a process that was to transport the image of Africa across separate planes of dehumanization latticed by the emerging modalities of Western culture. In England, at first gripped by a combative and often hysterical Christianity - complements of the crusades, the “reconquests”, and the rise of Italian capitalism - medieval English devouts recorded dreams in which the devil appeared as ‘a black moore’, ‘and Ethiope’. This was part of the grammar of the church, the almost singular repository of knowledge of Europe. Centuries later the Satanic gave way to the representation of Africans as a different sort of beats: dumb, animal labour, the benighted recipient of the benefits of slavery. Thus the ‘Negro’ was conceived. The Negro - whose precedents could be found in the racial fabrications concealing's the Slavs (the slaves), the Irish and others - substantially eradicated in Western historical consciousness the necessity of remembering the significance of Nubia for Egypt's formation, of Egypt in the developments of Greek civilization, of Africa for imperial Rome, and more pointedly of Islam's influence on Europe's economic, political, and intellectual history. From such a creature not even the suspicion of tradition needed to be entertained. In its stead there was the Black slave, a consequence masqueraded as an anthropology and a history. The creation of the Negro was obviously at the cost of immense expenditures of psychic and intellectual energies in the West. The exercise was obligatory. It was an effort commensurate with the importance Black labour power possessed for the world

economy sculpted and dominated by the ruling and mercantile classes of Western Europe. [...] the Atlantic slave trade and the slavery of the New World were integral to the modern world economy. Their relationship to capitalism was historical and organic rather than adventitious or synthetic. The Italian financiers and merchants whose capital subsidized Iberian exploration of the Atlantic and Indian oceans were also masters of (largely ‘European’) slave colonies in the Mediterranean. Certainly slave labour was one of their bases for what Marx termed ‘primitive accumulation’. But it would be an error to arrest the relationship there, assigning slave labour to some ‘pre-capitalist’ stage of history. *For more than 300 years slave labour persisted beyond the beginnings of modern capitalism, complementing wage labour, peonage, serfdom, and other methods of labour coercion.* Ultimately, this means that the interpretation of history in terms of the dialect of capitalist class struggles would prove inadequate, a mistake ordained by the preoccupation of Marxism with the industrial and manufacturing centres of capitalism; a mistake founded on the presumptions that Europe itself had produced, that the motive and material forces that generated the capitalist system were to be wholly located in what was a fictive historical identity. From its very foundations capitalism had never been - any more than Europe - a ‘closed system’” [*emphasis added*] (Robinson 1983: 3-4).

Central to Robinson’s argument is the claim that capitalism did not emerge on a social terrain which was free of racial differentiation, nor did it inaugurate racial hierarchy as a novel historical phenomenon. Rather, capitalism developed in a West that *was already structured by racialism, a set of hierarchies, distinctions, and moral valuations that long predated capitalist relations of production (some 300 years)*. These racial logics were forged within Feudal Europe through religious antagonisms, civilizational hierarchies, and internal processes of differentiation directed at populations such as the Irish, Slavs, Jews, Africans, and others. Capitalism, on Robinson’s account, did not dissolve these structures in the name of abstract labour or universal class relations but instead absorbed, reorganized and intensified them.

It is in this context that Robinson introduces the concept of Racial Capitalism. This formulation does not suggest that capitalism merely deploys racism as an external tool to divide labour, nor that race simply overlays an otherwise class-driven system. Rather, Robinson draws attention to how racial differentiation is constitutive of capitalist development itself, shaping how labour is organized, valued, and coerced across time and space. Capital accumulation proceeds not through a seeming homogenization of social

relations into class relations, as traditional Marxist accounts may imply, but through the continual production of hierarchy and difference. In this sense, capitalism remains internally heterogeneous, structured by racial, cultural, and civilization distinctions that cannot be reduced to class position alone.

Robinson's emphasis on culture is especially significant for the present discussion. He insists that cultural formations, religious cosmologies, and historical memory are not epiphenomenal to economic structures but play a decisive role in shaping both domination and resistance. The Black Radical Tradition, as Robinson conceptualizes it, emerges not from the simple insertion of African peoples into a global proletariat, but from the persistence and transformation of cultural, political, and economic traditions which predate modern capitalism and remain irreducible to it. Race and resistance movements cannot be understood solely through the categories of class struggle developed within European industrial contexts.

This reframing has direct implications for how the history of race is periodized and conceptualized. By tracing racial differentiation to the religious antagonisms in the formation of the identity of Europe and following their transformation through slavery and empire, Robinson destabilizes the temporal boundary that locates race primarily with the transition from feudalism to capitalism in the fifteenth and sixteenth centuries. Race does not simply emerge as an ideological consequence of capitalist exploitation; it is already embedded in the historical conditions in which capitalism emerges. Consequently, Robinson opens a critical space for questioning classic structural Marxist accounts of race without abandoning materialist analysis; a move which prepares grounds for further examination of how racial and religious hierarchies are articulated across different historical configurations.

What I wish to draw out further from Robinson's work is his attention to the role Christianity plays as a formative epistemic framework through which racial meanings are produced throughout medieval Europe. His discussion does not present religion as some residual backdrop to economic change, but as an active site in which difference is imagined, moralized, and rendered socially intelligible. The recurrent association of Blackness with the demonic, the bestial, and the morally degraded appears within a theological grammar that precedes the consolidation of capitalist social relations and cannot be fully understood through class struggle alone. Rather than locating the emergence of race in a discrete historical rupture, Robinson foregrounds a set of epistemic practices through which difference is rendered legible, evaluated, and hierarchized over time. These practices do not necessarily constitute race as it later appears in modern political and scientific discourse, but they nevertheless establish durable racial logics

through which bodily different acquires social and political force. It is this dimension of Robinson's analysis that opens an avenue for closer examination of the relationship between religious hierarchy and racial formation.

Following Robinson's attention to the cultural and epistemic foundations through which racial meaning becomes legible, Satnam Virdee's (2019; 2021) work pushes this line of inquiry in racial capitalism further into the historical terrain of late medieval and early modern Europe. Virdee offers a historically specified account of how religious hierarchies become politically stabilized in the context of (Absolutist) state formation, elite conflict, and social restructuring. Rather than treating religion as a residual inheritance gradually displaced by capitalist relations, he situates religious differentiation within concrete processes through which belonging, exclusion, and hierarchy are reorganized within the political. In doing so, Virdee draws attention to distinctions grounded in Christian lineage and blood as influential principles of social and political belonging that increasingly mediate access to power, protection, and legitimacy. This shift marks a critical moment in which the articulation of religious and racial hierarchies begin to assume more explicit political and material form, preparing the grounds for which they can be subsumed in the consolidation of capitalist relations.

Drawing attention back to the "reconquests", commonly referred to as the *Reconquista* (eleventh to fifteenth centuries), Virdee (2021: 103), highlights below:

"[...] racialised religious superiority rooted in the purity of Christian blood developed incrementally among the Spanish elites as the unintended outcome of multiple determinants including the completion of the *Reconquista*, the multi-level crisis of the feudal mode of production, and the intra-elite struggles for power, wealth and influence that accompanied the formation of the absolutist state".

Virdee's intervention is particularly significant because it foregrounds how ideas of blood, descent, and religious lineage function as modalities of racial differentiation prior to the consolidation of modern racial science. These distinctions do not yet operate as race in its later scientific or biological formations, but they nevertheless establish forms of difference that are treated as inherited, durable, and resistant to individual transformation.<sup>13</sup>

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<sup>13</sup> For further reference on the use of 'race' as a term referring to blood, lineage, and inherited difference prior to its nineteenth century biological codification, see Hochman (2020). Hochman notes that early modern invocations of race frequently operated through concepts of descent, purity, and blood rather than phenotype or population taxonomy. This is particularly evident in the Iberian statutes of *limpieza de sangre* (purity of blood), where baptism and holy water were deemed insufficient to erase Jewish or Muslim ancestry. In this context, religious conversion did not neutralize difference but instead intensified attention to physical body, reinforcing the idea that certain populations carried ineradicable traits transmitted across generations. These

What is crucial here is that religious affiliation is no longer understood as a reversible matter of belief or practice, but becomes bound to the body, to ancestry, and lineage in ways that fix social status across generations.

Virdee further develops this line of inquiry by examining conflicts surrounding the *limpieza de sangre* (purity of blood) statutes regarding religious conversion and the effectiveness of holy water. As Virdee (2019: 122-123) states,

“While Pope Nicholas V as well as many Christian Spaniards opposed this first blood-purity statute (*limpieza de sangre*) on the grounds that it undermined the redemptive power of baptism, the direction of travel, was towards the expansion and diffusion of such racist practices as a way of ensuring that only those with an ‘unsullied’ Christian lineage could occupy positions of power and influence. Religious orders as well as universities in Cordoba and Seville followed Toledo in establishing such statutes in the 1460’s and 1470’s, and accompanying such exclusionary practices was a dehumanized set of representations that depicted Jews and *Conversos* as product of ‘monstrous mixture’, including demons and animals. In this way, racial antisemitism became enjoined to the struggles that led to the process of absolutist state formation in Spain, increasingly informing the political conflicts between nobility, clergy and the crown over taxation and local autonomy, the role of municipal government and the march towards political centralisation. Eventually, the Monarchy would reach an accommodation with the Christian religious orders, higher nobility and others keen to further their economic and political objectives at the direct expense of Jews and Muslims by accentuating the emphasis they placed on a racialising Christianity. In 1478, just one year before the official inauguration of Spanish absolutism, Ferdinand and Isabella agreed to establish the Inquisition with the express intention to ‘root out heretical beliefs and practices from among the *Converso* population [...] 700 *Conversos* were burned to death in Seville between 1480 and 1488, while another 5,000 received other punishments [...] The first fifty years of the Inquisition proved to be the ‘bloodies, producing thousands of death at the stake’. And the estates of such persons would be confiscated such that no descendant could lay claim to them, a racialised process of accumulation through forced dispossession that the Spanish would shortly launch on a mass scale in the Americas [...] It is surely of some significance to our

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debates reveal how distinctions grounded in religion become stabilized through blood and inheritance, without yet taking the full form of modern racial science.

understanding of racism that, just eight months after the fall of Granada in August 1492, the Genoese merchant and mariner Christopher Columbus would set off on his journey to the Americas, sponsored by that same dynastic union of Isabella and Ferdinand. The colonisation of the Americas would eventually bring into the Spanish state's orbit a vast multi-ethnic empire comprising Native American, African, and settler-colonial populations. Yet, here we see, literally a matter of months before, how the twin notions of Old Christian blood and genealogical purity were already being deployed by those same Spanish elites as powerful exclusionary technologies of power to cleanse the population within its internal state boundaries using the methods of expropriation, expulsion, and execution”.

These distinction operate, as Virdee contends, as modalities of race and racism through which power is consolidated and stabilized. What is analytically central in Virdee's account is that racialisation takes shape through the resolution of political and institutional crises rather than through a later ideological byproduct introduced fully by capitalism or racial sciences. The gradual displacement of baptism by lineage as the criterion of belonging marks a decisive reconfiguration in the logic of inclusion and exclusion. Religious difference ceases to be understood primarily as a matter of belief or practice, capable of transformation through conversion, and instead becomes embodied in the form of blood, ancestry, and lineage. In this process, historically contingent struggles over authority and legitimacy are rendered durable by being rearticulated as inherited and embodied distinctions that structure social positions across generations.

Virdee's emphasis on the diffusion of the blood purity statutes across religious orders, universities, and municipal institutions is particularly significant in this regard. These sites do not merely reflect exclusionary ideas but function as administrative and epistemic mechanisms through which genealogical purity is normalized as a legitimate principle of social and political ordering. Universities and religious institutions become key locations where ancestry is established as a criterion for authority, competence, and moral standing. The accompanying dehumanizing representations of Jews and *Conversos* as monstrous, demonic, or animalistic should therefore be understood as integral to this process of institutionalization of racialised exclusion. Such representations do not simply reflect prejudice but actively sustain exclusionary practices by recasting them as expressions of an underlying moral and ontological order rather than simply as outcomes of political decision making.

Crucially, Virdee demonstrates that these developments are inseparable from the struggles that accompany absolutist state formation. Racialised antisemitism becomes

increasingly entangled with conflicts between the crown, nobility, and clergy over taxation, local autonomy, and political centralization. The monarchy's eventual accommodation with elites invested in exclusion reveals how racialising Christianity operates as a technology of governance. By aligning political authority in genealogical purity, the state secures both legitimacy and material advantage while displacing the costs of consolidation onto racialised populations. Consequently, the *Reconquista* and the Inquisition appear not only as a religious institutional practice, but as an apparatus through which surveillance, punishment, and dispossession are coordinated in the service of political consolidation and state formation.

Finally, the temporal proximity between the fall of Granada, the intensification of the Inquisition, and the departure of Columbus underscores a critical continuity in the logic of racial governance. Colonial expansion into the Americas did not inaugurate racial thinking as such but extends and amplifies practices already deployed in the management of an internal difference. The Americas become a new terrain in which techniques forged through absolutist formation are amplified, rearticulated, and globalized. Racial hierarchy thus emerges not as a derivative of cultural supplement to economic exploitation, but a structuring logic articulated across political authority, material accumulation, and epistemic order.

What Virdee's analysis ultimately brings into view is a problem that cannot be resolved solely at the level of political economy or state formation. While his account powerfully demonstrates how religious hierarchy is stabilized through institutions, violence, and material dispossession, it also raises deeper questions concerning the conceptual status of race itself prior to modernity. If genealogical purity, inherited difference, and embodied hierarchies are already operating as durable principles of exclusion, then the issue is no longer simply how race is mobilized but how it becomes intelligible as such. In other words, Virdee shows how racialisation functions, but leaves open the question of how race itself can be analytically identified in periods that precede the racial sciences of modernity.

It is precisely this problem that Geraldine Heng (2018; 2011) addresses. Heng shifts the analytical focus from the consolidation of political authority to the epistemic and classificatory practices through which difference is rendered intelligible, durable, and actionable in medieval Europe. Rather than treating race as a concept that arrives fully formed with modernity, she interrogates the conditions under which populations are differentiated, hierarchized, and governed through embodied markers of religious difference. In doing so, she challenges the assumption that race requires either modern racial science or capitalist labour regimes in order to be analytically operative. As such,

Heng's intervention opens a critical space for examining racial logics prior to capitalism without reducing them to cultural prejudice or treating them as precursors awaiting full realization. What Heng's work foregrounds is the problem of how difference is classified, stabilized, and made socially consequential in historical contexts which precede modern conceptual distinctions.

Heng articulates this intervention more clearly in her definition of race and her insistence on the inseparability of religion, embodiment, and political power in medieval formations:

“Race is one of the primary names we have – a name we retain for the strategic, epistemological, and political commitments it recognizes – that is attached to a repeating tendency, of the gravest import, to demarcate human beings through differences among humans that are selectively essentialized as absolute and fundamental, in order to distribute positions and powers differentially to human groups. Race-making thus operates as specific historical occasions in which strategic essentialisms are posited and assigned through a variety of practices and pressures, so as to construct a hierarchy of peoples for differential treatment. My understanding, thus, is that race is a structural relationship for the articulation and management of human differences, rather than a substantive content [...] Religion – the paramount source of authority in the medieval period – could function both socioculturally and biopolitically: subjecting peoples of a detested faith, for instance, to a political theology that could biologize, define, and essentialize an entire community as fundamentally and absolutely different in an interknotted cluster of ways. Nature/biology and the sociocultural should not thus be seen as bifurcated spheres in medieval race-formation: They often crisscrossed in the practices, institutions, fictions, and laws of a political – and a biopolitical – theology operationalized on the bodies and lives of individuals and groups. This was not to claim, of course– absurdly– that race-making throughout the medieval period was in any way uniform, homogenous, constant, stable, or free of contradictions or local differences across the countries of Latin Christendom in all localities, regions, and contexts through some three or four centuries of historical time. Neither would it be to concede, in reverse, that local differences – variation in local practices and contexts– must always render it impossible to think translocally in the medieval period. The effort to think across the translocal does not require any supposition of the universal, static, unitary, or unvarying character of medieval race (Heng 2018: 3-4)

What is analytically decisive in this formulation is that race is neither reduced to biological substance nor dissolved into cultural contingency. Instead, Heng conceptualizes race as a structural relationship that emerges historically specific practices of essentialization, governance, and differentiation. This allows race to be identified without presuming the presence of modern scientific racism, whilst also resisting the tendency to treat premodern exclusions as merely local or episodic. The emphasis on religion as both sociocultural and biopolitical is especially important here, since it clarifies how religious difference could be rendered embodied, inheritable, and politically decisive in the absence of a fully articulated modern racial science. In this respect, Heng provides a conceptual vocabulary necessary to understand how racial logics operate prior to capitalist consolidation in a manner that is fully compatible with Robinson's insistence on the pre-existence of racial hierarchies and Virdee's demonstration of their political stabilization through governance and state formation.

Drawing on legal statutes, ecclesiastical decrees, theological writings, medical treatises, and cultural practices extending back to the twelfth century, Heng reconstructs the medieval European landscape in which populations such as Jews and Muslims were constituted as permanently distinct collective identities. These groups were not merely marked as religious outsiders but increasingly treated as embodied and inheritable forms of difference whose status could not be altered through conversion or individual conduct. Legal mandates regulating dress, bodily markers, residence, and occupation functioned to fix difference at the level of the body and of the group. Over time, these measures produced a cumulative erosion of legal, economic, and social standing that culminated in mass expulsion or extermination. Difference is rendered transgenerational, collective, and politically consequential.

Heng (2011) documents this process with particular clarity on Jewish populations within England dating back to the twelfth century.

"In 1218, Jews in England were forced by law to wear badges on their chests, to set them apart from the rest of the English population. This is the earliest historical example of a country's execution of the medieval Church's demand, in Canon 68 of the Fourth Lateran Council in 1215, that Jews and Muslims be set apart from Christians by a difference in dress. In 1222, 1253, and 1275, English rulings elaborated on this badge for the Jewish minority – who had to wear it (men and women at first, then children over the age of seven) – its size, its colour, and how it was to be displayed on the chest in an adequately prominent fashion. In 1290, after

a century of laws that eroded the economic, religious, occupational, social, and personal status of English Jews, Jewish communities were finally driven out of England *en masse*, marking the first permanent expulsion in Europe. Periodic extermination of Jews was also a repeating phenomenon in medieval Europe. In the so-called Popular and First Crusades, Jewish communities were massacred in the Rhineland, in Mainz, Cologne, Speyer, Worms, Regensburg, and several other cities. The Second Crusade saw more Jew-killing, and the so-called Shepards' Crusade of 1320 witnessed the genocidal decimation of Jewish communities in France. In England, a trail of blood followed the coronation of the famed hero of the Third Crusade, Richard Lionheart, in 1189, when Jews were slaughtered in Westminster, London, Lynn, Norwich, Stamford, Bury St. Edmunds, and York, and English chronicles attest. *Scientific, medical, and theological treatises also argued that the bodies of Jews differed in the nature from the bodies of Western Europeans who were Christian*: Jewish bodies gave off a fetid stench (the infamous *foetor judaicus*), and Jewish men bled uncontrollably from their nether parts, either annually, during Holy Week, or monthly, like menstruating women. Some authors held that Jewish bodies also came with horns and a tail, and for centuries popular belief circulated through the countries of the Latin West that Jews constitutionally needed to imbibe the blood of Christians, especially children, whom they periodically mutilated and tortured to death, especially little boys. Cultural practices across a range of registers also disclose historical thinking that pronounces decisively on the ethical, ontological, and moral value of black and white. The thirteenth-century encyclopaedia of Bartholomeus Anglicus, *De Proprietatibus Rerum* (On the Properties of Things), offers a theory of climate in which cold lands produce white folk and hot lands produce black: white is, we are told, a visual marker of inner courage, while men of Africa, possessing black faces, short bodies, and crisp hair, are 'cowards of heart' and 'guileful'" (Heng 2011: 15-16).

What is analytically decisive in Heng's research is not simply the scale of brutality of these practices, but the logic through which difference is rendered durable, inheritable, and collectively binding. The measures she documents do not target individual belief, conduct, or political allegiance, but instead operate through population-level attribution in which Jewishness is treated as a permanent condition that persists across generations. Conversion, repentance, or social integration do not work as mechanisms of integration because difference is no longer understood as a matter of practice but as a property of the

body and descent. In this way, religious difference is transformed into a fixed status which is inscribed upon the body. In this way, religious difference is transformed into a fixed status that governs access to protection, rights, and life itself.

Furthermore, what Heng draws out is the role of knowledge production in stabilizing this exclusionary order. The proliferation of medical, theological, and scientific claims concerning Jewish bodies does not merely accompany legal discrimination but actively sustains it by providing an epistemic framework through which exclusion appears justified and necessary. Moral judgement, religious condemnation, and corporeal difference are collapsed into a single classificatory register, such that bodily deviation is taken as evidence of an inner defect. Difference is thus inscribed onto the body in ways that render it visible, legible, and seemingly self-evident, thereby naturalizing political violence and juridical exclusion.

Equally important is the fact that these embodied distinctions do not depend on a modern biological discourse or the emergence of the capitalist world-economy in order to operate effectively. Heng demonstrates that race-making in medieval Europe proceeds through a convergence of juridical authority, theological reasoning, and epistemic practices that together stabilize racialised hierarchies. The body becomes the site at which difference is naturalized, even as the criteria through which that body is interpreted remain deeply entangled with religious cosmology and political power. This reinforces Heng's broader claim that race must be understood as a structural relationship rather than as a doctrine grounded purely in biology or the emergence of the capitalist world-economy.

Taken together, the practices and representations documents in Heng's account reveal a mode of racialisation that is systemic rather than episodic. Legal regulation, embodied marking, epistemic authorization, and mass violence function as mutually reinforcing mechanisms through which entire populations are rendered governable, disposable, and fundamentally different. These dynamics cannot be adequately explained as the byproduct of economic relations or as cultural residue awaiting capitalist transformation. Instead, they point to a historically specific form of racial ordering that precedes capitalism while remaining fully political, material, and institutional in its effects.

In conclusion, the critique developed in this section clarify that *race operates as a historically durable and structurally formative logic rather than as a secondary ideological effect that emerges only with capitalist world-economy*. Robinson demonstrates that capitalism consolidates within a world already organized through racial hierarchies rather than generating them as a new consequence of the emergence of capitalism. Virdee shows how religious difference becomes politically stabilized through governance, elite struggle, and (absolutist) state formation, transforming belief into an inherited and

enduring status which becomes exported to the Americas as opposed to finding their origin within the Americas. Heng extends this trajectory by revealing how juridical, epistemic, and embodied practices in medieval Europe render difference transgenerational and politically actionable without recourse to modern racial science. Read together, these accounts establish that race functions across multiple domains and historical configurations, shaping political authority, social classification, and bodily intelligibility in ways that exceed the explanatory reach of economic relations alone. For W-SA, this synthesis underscores a need to rethink how race is conceptualized within the modern world-system, not as a derivative cultural ideology attached to the economic pillar, but as a *foundational logic that cuts across and helps constitute the political, cultural, and economic dimensions of the system itself*.

### 7.3. Race and the Temporal-Conceptual Foreclosure of World-Systems Analysis

The preceding sections have demonstrated that W-SA encounters persistent difficulties in accounting for race, despite its explicit recognition of the cultural pillar, in which race is confined, as a constitutive dimension of the modern world-system. As established in Chapter 7.1, these difficulties do not arise from an outright neglect of race, but from a structural alignment with the economic approach in which race is rendered analytically significant and/or overdetermined by the economic insofar as it stabilizes capitalist accumulation and the axial division of labour. As Chapter 7.2 shows, this alignment becomes historically untenable once a more culturally sensitive account of racial formation is taken seriously. Drawing on Robinson, Virdee, and Heng, the section demonstrated that racial differentiation not only predates capitalist consolidation but also operates within the boundaries of Europe whilst taking religious, juridical, genealogical, and epistemic form that cannot be fully understood when reduced to a consequence of the emergence of capitalism.

The persistence of this disjunction points not to the absence of race within W-SA, but to the limited analytical work it performs. Importantly, race is neither ignored nor necessarily marginal within the framework as it is consistently acknowledged as a constitutive element of the modern world-system. This is exemplified through its entanglement with European universalism and being regarded as one of the primary antimonies within the cultural pillar. However, beyond bringing attention to this, race receives relatively little analytical force outside of legitimating statements. In this sense, race is simply understood as a cultural or ideological formation that stabilizes economic structure rather than as *a structuring logic whose historical development and articulation across modernity are fundamental*. Consequently, race remains conceptually constrained

by the explanatory priorities of the framework, even as its significance is continually reaffirmed.

It is at this point that the work of Robert Bernasconi (2001) could be especially fruitful. Despite not working within the world-systems framework nor offering a direct critique of world-systems as such, Bernasconi can provide the conceptual resources for understanding how the contemporary distinctions between race, religion, and culture have come to structure the interpretation of earlier historical formations. His analysis draws attention to a presentist tendency within modern social theory, whereby distinctions are treated analytically self-evident and are applied retroactively to periods in which they did not operate as fully separate domains. In doing so, Bernasconi can help clarify how racial differentiation grounded in religion, lineage, and inherited status can come to be misrecognized or displaced within modern theoretical frameworks, even when such differentiation functions through permanence, collective attribution, and exclusion.

Crucially, we must come to understand that the difference between religion and culture during the early formation of the world-system are not as clear cut as they are presently. Bernasconi (2023: 34-35), fully aware of the historical and racial implications of this blurred divide, contends that:

“[...] religion has come to be thought of as both cultural and a matter of choice: as a result, it is believed that one can always change one’s religion or refuse religion altogether. But the distinction between nature and culture is not found in the earlier period, at least not in anything like the way it is understood today. Indeed, there was as yet no biological conception of heredity to which one could appeal in order to give an explanation of the inheritance of physical characteristics. There was only a clear sense of constancy across generations that extended to include customs and even one’s religion [...] One’s race and one’s religion were in many ways as permanent or as temporary as each other. More to the point – they were so intertwined, or – from a twentieth-century perspective – so conflated, that it is only in certain contexts that one can clearly see the seeds of the subsequent separation [...] One indication of the proximity between these two terms can be found in the fact that the Spanish word *raza*, which we would translate as “race,” after having initially been used to differentiate breeds of animals and lineages of nobles, was increasingly used in the sixteenth century to differentiate between religions: it came to refer to ‘descent from Jews, Muslims, and eventually other religious categories’”.

Bernasconi argues that the contemporary understanding of the divide between religion and race has led to a historical misinterpretation. In fact, the two concepts were so closely linked that religion took on a sense of permanency in a manner that race comes to be understood via what later became conceptualized as biological racism. Such is evidenced by the fact that while non-Christians were described in an early racially formative and biological manner, such was not the same for Christians. Such asymmetry reveals the extent to which religion and race were historically conflated, rather than operating as distinct analytical domains. Belonging to Christendom, therefore, came to function not merely as a matter of belief or spiritual orientation, but as an inherited status that was associated with purity, while Jewish or Muslim descent was marked as a stain transmitted across generation, irrespective of conversion or cultural assimilation (Bernasconi 2001; Heng 2011).

What Bernasconi's work ultimately exposes is a presentist problem that conditions how earlier forms of racialisation are subsequently understood. By treating the contemporary distinction between race and religion as analytically self-evident, modern social theory retroactively applies categories to historical contexts in which they did not yet operate as separable domains. In doing so, it becomes possible to misclassify forms of differentiation that functioned through inheritance, lineage, and permanence, as merely religious or xenophobic, rather than as racialising practices. The effect of the misrecognition is not simply conceptual precision, but a systematic displacement of earlier racial formations outside of a narrow conception and periodisation of race.

Seen in this light, the problem is not that earlier societies lacked racial differentiation, but that W-SA in its current form lacks the conceptual and temporal flexibility to recognize it. What appears as an absence of race is, instead, the result of theoretical refusal to extend the concept beyond the temporal boundaries of the emergence of the capitalist world-economy. Such a refusal constructs a sharp break or rupture between the premodern and modern form of racial domination, even when historical continuities are presented. Consequently, this oversight promotes an assumption that racial hierarchies emerge within a vacuum, untainted by the centuries of conquest (Dussel 1995), disconnected from the racialisation practices that were fundamental to absolutist state formation which was exported to the Americas (Robinson 1983; Virdee 2023), that the empirical turn in the structures of knowledge were not gazing upon the consequences of centuries of racial domination and extermination (Grosfoguel 2002), and that (Cartesian) Subject at its heart was not already blind to its consequences (Grosfoguel 2002; Wynter 2003; Dussel 1991; Balibar 2015; 2016).

In closing this Chapter, I want to drive home the importance of recognizing the histories which come to inform our understanding of race and solidify the importance of recognizing them, not only for historical attentiveness, but for the *longue durée* structures of racial inequality. Recalling Wallerstein focus on the importance of ‘pastness’ in the construction of peoplehood discussed in Chapter 5.1, there is certainly a recognition of the importance of the past. As Wallerstein (1991; 1987) himself has stated, ‘peoples’ are constructed identities that are used to explain ‘why things are the way they are’:

“The whole point of these categories seems to be to enable us to make claims based upon the past” to make sense of the present [...] Pastness is a mode by which persons are persuaded to act in the present in ways they might not otherwise act. Pastness is a tool persons use against each other. Pastness is a central element in the socialization of individuals, in the maintenance of group solidarity, in the establishment of or challenge to social legitimation. Pastness therefore is pre-eminently a moral phenomenon, therefore a political phenomenon, always a contemporary phenomenon [...] The past is normally considered to be inscribed in stone. The social past, how we understand this real past, on the other hand, is inscribed at best in soft clay (Wallerstein 1987: 380-381).

Wallerstein (1991; 1987) grounds this reflection on pastness with only real critical reflection regarding the expansion of the capitalist world-economy and how such consequences of a history of capitalist exploitation come to influence the concept of the Citizen and political belonging in the nineteenth century. Yet, there is no critical attention to the pastness of race outside of barbarism and civilizational rhetoric which he contends are forms of xenophobia as opposed to racism (Wallerstein: 2011). In doing so, W-SA applies its own insight unevenly, recognizing the political force of historical narratives whilst restricting the racial past to something seemingly outside of history (Marx 1848; Heng 2018). The consequence is that we can become blind to the manner in which race and racism has proven historically malleable, persistent, and insidious.

It is precisely this foreclosure that (Heng 2018) has anticipated as a central limitation of canonical race theory. As she states,

“The ability of racial logic to stalk and merge with other hierarchical systems– such as class, gender, or sexuality– also means that race can function as class (so that whiteness is the colour of medieval nobility), as “ethnicity” and religion (Tutsis and Hutus in Rwanda, “ethnic cleansing” in Bosnia), or as sexuality (seen in the

suggestion raised at the height of AIDS hysteria in the 1980s that gay people should be rounded up and cordoned off, in the style of Japanese American internment camps in World War II). Indeed, the “transformational grammar” of race through time means that the current masks of race are now overwhelmingly cultural, as witnessed since September 11, 2001. Definitions of race in practice today at airport security checkpoints, in the news media, and in public political discourse flaunt ethnoracial categories decided on the basis of religious identity (“Muslims” being grouped as a *de facto* race), national or geopolitical origin (“Middle Easterners”), or membership in a linguistic community (Arabic-speakers standing in for Arabs). But if our current moment of flexible definitions— a moment in which cultural race and racisms, and religious race, jostle alongside race-understood-as-somatic/biological determinations— uncannily renews key medieval instrumentalizations in the ordering of human relations, race theory’s examination of the past nonetheless stops at the door of modern time. A blind spot inhabits the otherwise extraordinary panorama of critical descriptions of race: a cognitive lag that makes theory unable to step back any further than the Renaissance, that makes it natural to consider the Middle Ages as somehow outside real time” (Heng 2018: 11).

Heng’s diagnosis clarifies that the limitation at stake is not simply empirical oversight, but a deeper theoretical reluctance to confront the *longer durée* of racial formation. Race persists not because it is fixed, but because it has proven capable of attaching itself to an intersecting multitude of hierarchical systems and reappearing in different conceptual guises that are informed and justified by our structures of knowledge. What changes over time are not necessarily the effects of racism but the modalities of race and the forms through which it is rendered intelligible, governed, and normalized. If we continue to promote a temporal and conceptual foreclosure to our understanding of the problem at hand, we risk becoming unable to recognize contemporary racial formations as historically produced phenomena with their own lineages and conditions of intelligibility.

In summary, this Chapter has argued for the necessity of moving beyond strictly economic approaches to race whilst retaining the critical insights that material analysis provides. As outlined in Chapter 7.1, economic explanations offer indispensable accounts of exploitation, accumulation, and structural inequality, but they are insufficient when race is treated solely as a derivative or stabilizing ideology of capitalist relations. The analyses developed in Chapter 7.2 have demonstrated that racial differentiation not only predates capitalist consolidation but also can operate through religious, juridical, genealogical, and epistemic formations that cannot be reduced to economic causality alone. Taken together,

these critiques highlight a temporal and conceptual foreclosure regarding race in W-SA. In overcoming these conceptual barriers, we must continue to foreground race as a structuring logic of the world-system.

By bringing these tension into view, this chapter has sought not to abandon W-SA, but to press it to follow through on its commitments. Recognizing the *longue durée* of racial formation and the multitude of domains through which race has been articulated does not undermine material analysis but strengthens it. It is from this contention that race should be foregrounded as a foundational logic of the world-system that the following chapter will push into the relationship between the manner in which race and racism were articulated within the structures of knowledge that were foundational for the rise of liberalism during the enlightenment and exported globally as the geoculture of the world-system.

## 8. Race and the Cartesian Epicentre of the Western Structures of Knowledge

The analysis developed throughout Chapter 7 demonstrated that the temporal and conceptual foreclosure at the heart of W-SA's treatment of race carries consequences that extend well beyond the question of historical periodisation. Chapter 7 established that Wallerstein situates race firmly within the economic approach identified by Hall (1980), treating racial formation as derivative of economic pillar. As a result, racial differentiation tends to appear as a secondary ideological effect rather than as a constitutive logic of the world-system. Most significantly for the present discussion, the critique developed in Chapter 7 also revealed that race is not simply an object acted upon by historical forces, but a logic that actively structures how the world is known, classified, and justified. It is this insight that directs the analysis toward the structures of knowledge.

Chapter 8 takes up this problem by turning to the epistemic foundations of the modern world-system. Rather than examining race through W-SA's strengths in economic relations and political institutions, the chapter focuses on the underexplored structures of knowledge through which the human, the Subject, and universality itself come to be defined. This shift is necessary because the persistence of race cannot be explained without examining the epistemic forms that render hierarchy and exclusion intelligible and legitimate in the first place. It is worth noting that this chapter is necessarily more philosophical and theoretically dense than those preceding it. This reflects the nature of the inquiry itself: to examine the epistemic underpinnings of the structures of knowledge and the philosophical formations through which race is embedded within them requires sustained engagement with the foundational concepts and thinkers through which those formations were constituted.

As established across Chapters 4, 5, and 6, Wallerstein does not ignore the structures of knowledge. He names European universalism as the overarching ideology of the capitalist world-system (Wallerstein 1990; 2006), identifies the epistemic shift from theological to secular rationalism as a defining feature of modernity (Wallerstein 2004a), and acknowledges that the Two Cultures are foundational to the institutionalisation of the geoculture (Wallerstein 1991; Lee 2003). What remains underdeveloped within this framework, however, is how these epistemic transformations were themselves racialised, and how the universal Subject they produced was always already bounded by exclusion. Most specifically, there is a surprising absence in Wallerstein's account of an essential figure within the structures of knowledge and central to the justification of colonial occupation: the Cartesian Subject.

What this chapter draws together is the sustained scholarly argument that the Cartesian Subject constitutes the epicentre of Western structures of knowledge, and that this Subject is Janus-faced from its inception (Grosfoguel 2002; Wynter 2003). The same epistemic formation that promises autonomy, Reason, and emancipation from theological authority is entangled with exclusion, differentiation, and racial hierarchies. Long before race is codified in modern political institutions, it was already embedded within the epistemic construction of the Subject itself. By tracing the invention of Man, the consolidation of the Cartesian Subject, and their persistence within modern knowledge formations, this chapter establishes the epistemic groundwork for understanding how race is foundational within the structures of knowledge. While this chapter remains focused on epistemic formation, the political implications of these structures, particularly their translation into liberal discourses and the figure of the Citizen, are taken up explicitly in Chapter 9.

#### 8.1. The Cartesian Epicentre of the Structures of Knowledge.

As previously discussed across Chapters 4 and 5, Wallerstein views liberal political ideology as emerging in the wake of the French Revolution (Wallerstein 1995; 1991). Throughout the nineteenth century, the three political ideologies of conservatism, liberalism, and radicalism employed ideological tactics to ensure that those they considered most suited for social change would be granted the rights to shape it (Wallerstein 1995). In this political battle, it was liberalism that proved to be triumphant and had its agenda institutionalised and globalised. This institutionalisation largely took the form of extending citizenship and gradually expanding suffrage, processes that allowed liberalism to appeal towards the *Weltanschauung* of modernity, but only to the point that such inclusive political practices would not threaten the accumulation of surplus capital (Wallerstein 2003). In presenting itself this way, liberalism appealed to the modernity of liberation through the promises of freedom, rights, and moral progress. Yet, at the same time, liberalism also embraced the modernity of technology, the capitalist worldview that entrenched new forms of inequality and helped sustain the very forms of exploitation that liberation sought to overcome (Wallerstein 1995). Wallerstein (1991) has argued that geoculture is fundamental to the development of the capitalist world-economy, defined as a "set of shared ideas, values, and norms that were widely accepted throughout the system and that constrained social action thereafter" (Wallerstein 2011: xvi). In this sense, geoculture is what stabilises the world-system through its embrace of both the modernity of liberation and the modernity of technology by translating material inequalities into natural and justified hierarchies. Citizenship preached the universal language of equality

and liberation, yet was far less inclusive in practice when it came to women, non-Europeans, and racialised populations. As a consequence, centrist liberal geoculture provided stability within the world-system through this dualistic and contradictory embrace, embodied in the concept of the Citizen.

Despite the importance placed on geoculture and the construction of the Citizen, Alexandre Gelis-Filho (2019) calls attention to the fact that Wallerstein situates the emergence of geoculture when institutionalised in the triumph of liberalism in the wake of the French Revolution. Whilst the geoculture and the accompanying structures of knowledge are recognised as essential to stabilising, obfuscating, and justifying the contradictions of the world-system, much of the analytical focus is reduced to when liberalism gains hegemony. The importance of this underdevelopment lies in the fact that humanist and liberal discourses that were fundamental to Enlightenment political thought were already shaping the structures of knowledge, the cultural-ideological realities of the world-system, and racial exclusions long before liberalism achieved its geocultural institutionalisation. In this sense, Wallerstein's account attends to the moment of structural consolidation rather than the histories that gave rise to its conditions of possibility, a tendency whose consequences become most significant when the relationship between the structures of knowledge and racial formation is examined.

The work of Étienne Balibar (2015; 2016) is beneficial here, as it operates at the junction between epistemology and politics, allowing us to trace how universalism functions simultaneously as a philosophical claim and a mechanism of exclusion. Balibar (1991) contends that before the figure of the Citizen emerged, there was already the Subject of Enlightenment philosophy, constructed through the lens of Cartesian universalism. For both Balibar and Wallerstein, universalism and racism are not contradictory but intertwined, and the very discourses articulating the Subject proclaimed universal equality whilst instituting new forms of exclusion (Wallerstein 1991; Balibar 1991). Returning to Chapter 3.2 of Part I, what Wallerstein (1990) names as the symbiotic pair of universalism and racism, the doctrine that proclaims inclusion and the ideology that justifies whose exclusion that inclusion requires, is the structural outcome of a formation that was constituted far earlier at the epistemic level. Wallerstein's account identifies the pairing as operative within the geoculture, yet the philosophical and epistemic conditions through which it was produced remain largely unexamined. Long before centrist liberalism ascended to the geoculture of the world-system, the invention of not just the Subject but of Man had taken place (Wynter 2003; Balibar 1991). Through the work of Descartes and the epistemic shift away from theocentric thinking and towards modern and empirical science,

the articulation of Man and of the Subject is entangled with the contradictory and Janus-faced nature of liberalism.

The implications of the persistent influence of Cartesian philosophy on racialisation within the capitalist world-economy cannot be overstated. Wallerstein (1991: 190) himself insists that "the crucial intellectual problem of the modern world was the construction of the epistemological divide between two cultures, the culture of science and the culture of philosophy and the humanities". He later adds that "for at least two centuries now, science has been enthroned as the most legitimate path, even the only legitimate path, to truth", a development that was "the deliberate construction of Newtonian-Cartesian science" (Wallerstein 2000: 160-161). Richard Lee (2003: 44) clarifies this transformation by describing how a novel "epistemological hierarchy" emerged in which authoritative knowledge was progressively defined as the other of spiritual or moral values, thereby separating the true from the good. These reflections provide the conceptual basis for seeing the division of the Two Cultures as central to the structures of knowledge that helped stabilise the modern world-system. What remains to be developed is how these very structures were not only essential to the construction of race but also embedded within the broader history of racialisation, conquest, and colonialism. Wallerstein and Lee provide the conceptual scaffolding for understanding how the separation of the Two Cultures and the epistemological hierarchy of modern science stabilised the world-system, but they stop short of addressing how this epistemic order itself was racialised. This is where postcolonial and race-critical scholars extend the analysis, showing that the very discourse of modernity and the Enlightenment Subject was from its inception entangled with colonial conquest and racial exclusion.

What is most pertinent for this discussion is the oversight in further reflecting on the implications of the work of René Descartes and Cartesian philosophy for not only the structures of knowledge but also racial discourse. Whilst Wallerstein provides an exegesis of Cartesian and Baconian science focused on the implications leading to the division between the Two Cultures and the structures of knowledge, there is a surprising absence in his account of an essential figure within the structures of knowledge and central to the justification of colonial occupation: the Cartesian Subject. Furthermore, this figure remains essential for the contemporary functioning of society as it is embedded within the very discourse of modernity. It is precisely this figure that postcolonial and race-critical scholars functioning within and against world-systems discourse have drawn sustained attention to, identifying it as the site at which the racial logics underwriting the structures of knowledge are most clearly visible. As Grosfoguel (2002: 214) states:

"Rene Descartes, the founder of Modern Western Philosophy, inaugurates a new moment in the history of Western thought. He replaces God, as the foundation of knowledge in the Theo-politics of knowledge of the European Middle Ages, with (Western) Man as the foundation of knowledge in European Modern times. All the attributes of God are now extrapolated to (Western) Man. Universal Truth beyond time and space, privilege access to the laws of the Universe, and the capacity to produce scientific knowledge and theory is now placed in the mind of Western Man. The Cartesian '*ego-cogito*' ('I think, therefore I am') is the foundation of modern Western sciences. By producing a dualism between mind and body and between mind and nature, Descartes was able to claim non-situated, universal God-eyed view knowledge [...] Historically, this has allowed Western man (the gendered term is intentionally used here) to represent his knowledge as the only one capable of achieving a universal consciousness, and to dismiss non-Western knowledge as particularistic and, thus, unable to achieve universality."

Grosfoguel argues that Descartes marks a decisive shift in Western epistemology by replacing God with (Western) Man as the ultimate source of knowledge. In doing so, Descartes transfers divine attributes, such as universality, objectivity, and privileged access to truth, onto the Western subject. Through the Cartesian dictum "I think, therefore I am", knowledge becomes centred in the individual mind, detached from body, nature, and context. Yet, such a claim must be understood in the context in which it arises. This remains especially important when recognising the rise of empirical sciences during this period. Consequently, Descartes and what later came to be known as the Cartesian Subject cannot and should not be fully understood outside of the empirical realities of Western colonial domination.

Enrique Dussel (1995) has poignantly come to such a reflection, observing that colonial conquest existed some 150 years prior to Cartesian science. As such, the dictum "*ego conquiritur*" ('I conquer, therefore I am') is aptly fitting to recognise the history of social, economic, political, and historical conditions which set the stage for the Western Subject to assume the "arrogance of a God-like and put himself as the foundation of all truthful knowledge" (Grosfoguel 2002: 215). In other words, when there is a fundamental shift toward empiricism and the study of Nature and Man's place within it, we must reflect on the material conditions which inform the theoretical conclusions. It is these conditions that render the Cartesian claim to universal, disembodied knowledge not a philosophical achievement but a historically and racially situated one. Not only was the shift away from theological hegemony essential for the invention of Man and attempts at mastery over

Nature, but such discourses remained essential for the articulation of European universalism and the racial logics embedded within the structures of knowledge (Wynter 2003; Balibar 1991; Heartfield 2006).

What this exposes is that the epistemological foundations of modernity and the world-system are inseparable from the colonial and racial logics which underwrite them. The Cartesian Subject, far from being a universal or neutral figure of Reason, represents the moment at which Europe re-centres itself as the locus of knowledge, morality, and civilization. The dualisms introduced by Descartes between mind and body, subject and object, civilized and 'barbarian', were not mere philosophical abstractions but helped form the very epistemic structures through which inclusion and exclusion became naturalized. Consequently, the Cartesian Subject functions as a part of the epistemic architecture through which European universalism and racial particularism are embodied. To understand the full depth of this architecture and the racial logics through which it operates, it is necessary first to examine the broader epistemic formation within which the Cartesian Subject acquires its conditions of possibility. Long before Descartes consolidates the rational Subject as the foundation of modern knowledge, a prior and foundational reconfiguration of the structures of knowledge is already underway. It is to this formation, and to the humanist invention of Man through which it takes shape, that the following section turns.

## 8.2. Humanism and the Invention of Man

This section turns to the philosophical paradigms that underpin the structures of knowledge and that have been foundational in the emergence of the Subject: humanism. This domain is not approached as an abstract philosophical tradition or normative ideal, but as a historically situated framework that has shaped how personhood, legitimacy, and the boundaries of the human have been conceptualized since their formation in the structures of knowledge early in the formation of the modern world-system (Wynter 2003; Balibar 1991). These paradigms do not simply accompany the rise of Western political thought; they actively organize the epistemic conditions under which certain forms of life become intelligible as human, rational, moral, and worthy of recognition (Wynter 2003). In this sense, humanism is not simply of historical interest. It is the very epistemic formation within which the philosophical premises of liberal political thought acquire their grounding, and through which the racial logics already operative within the structures of knowledge are rearticulated through secular epistemic registers.

Humanism is also the very paradigm through which colonial domination, racial hierarchy, and political violence have been rendered legible and justifiable across

modernity (Goldberg 1993). The philosophical elevation of "Man" as the measure of the human has structured social relations and the processes of subjection from early colonial encounters and slavery through to what was "born and executed in our modern rational society, at the height of our civilizations and at the peak of our human cultural achievement, namely, the Holocaust" (Bauman 1991: 28). Consequently, humanism does not simply underpin Western political ontology but also provides the conceptual terrain through which racial ideologies have been articulated and naturalized throughout modernity, and through which democracy and far-right political ideologies emerge as historically distinct yet structurally related formations, each foundational in the varying articulations of racial ideologies across the modern world-system.

To foreground the historical depth of the philosophical paradigms under examination, we must now return to the earlier epistemic rupture that made their emergence possible. Humanism, far from being a neutral or purely emancipatory discourse, emerges within a broader reconfiguration of knowledge that displaced theocentric authority and re-centred meaning in the figure of Man (Wynter 2003; Grosfoguel 2002). This shift was not a clean break but a layered transformation that rearticulated hierarchy and difference through secular registers of Reason, Nature, and universality (Wynter 2003; Foucault 1966). Of course, the invention of Man is not the beginning of liberalism, but it does represent the conceptual foundation upon which liberal political discourse and the Subject will later be built (Wynter 2003; Balibar 1991). In this sense, despite Renaissance humanism owing a great debt to the Islamic Golden Age (8th-10th centuries), it serves as a symbolic starting point within the West and for the focus of this project.<sup>14</sup>

Renaissance humanism represents what Howard Winant (1994) describes as an "immense historical rupture" that has proven to be a gateway to contemporary Western modernity (Winant cited in Wynter 2003: 262). Such importance to this shift in ontology and epistemology is also given by Sylvia Wynter (2003), who argues the 15th century Renaissance up until the 18th century Enlightenment as the period in which there was the first "reinvention of Man" (264). However, religiously grounded ontological structures begin to waver during the 'translation movement' that was sparked by the ability to translate Greek and Hebrew into Latin, and later into Italian. Not only were works from the likes of Plato translated, but also those attributed to Egyptian magicians and philosophers (Pollnitz 2019). While many of these texts could be considered 'mystical' in nature, they helped push towards a scientific revolution. Furthermore, there are those that placed

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<sup>14</sup> For further research on the influence and legacy of the Translation Movement, refer to Dimitri Gutas (1998), *Greek Thought, Arabic Culture*.

humans at the centre of the universe. In fact, the term 'renaissance' means 'rebirth' (Pinn 2019). It is during this period that religious ontologies began to lose their hegemonic status, and European populations began the process of understanding the world and themselves in a different manner. This shift did not entail the disappearance of religious authority, nor did it immediately dismantle existing hierarchies. Rather, it marked a transformation in the grounds upon which claims about the human could be made, justified, and stabilized.

The gradual erosion of theocentric ontologies produced a profound reorientation in how human difference was interpreted. Of course, religious difference did not vanish with the emergence of modernity but instead was increasingly framed through emerging secular modes of reasoning that further rendered inherited distinctions intelligible within a newly evolving human-centric orientation. The significance of this shift lies not in a simple transition from premodern to modern or from religion to science, but in the way that earlier hierarchies were reorganized and naturalized through new explanatory registers (Foucault 1966; Wynter 2003). Humanism, in this sense, did not emerge as a purely emancipatory discourse but as an intellectual formation that supplied new epistemic grounds for interpreting inequality, authority, and difference.

It is within this early transitional and human-centric intellectual climate that the academic tradition of humanism begins to take shape and institutional form.<sup>15</sup> Humanism can be understood as a continually evolving philosophical orientation that broadly represents a shift away from religious-centred ontologies, epistemologies, and methodologies for defining what it means to be human. In fact, it is a common understanding that humanism is a counter to the 'totalizing intents of theocentric frameworks', that is, religious-grounded structures of knowledge (Pinn 2019). As previously noted, philosophy during this period was regarded as a form of science and humanism itself was closely entangled with the development of the human sciences throughout the fifteenth century and culminating in the eighteenth-century Scientific Revolution. Yet, humanism cannot be understood in isolation from the historical conditions in which it emerged. Most certainly, humanism and the human sciences were articulated in the aftermath of conquest and located firmly within a colonial context (Wynter 2002; 2007; Veracini 2023).

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<sup>15</sup> To attempt to define humanism in a way that is suitable for everyone is a seemingly impossible task. There are varying definitions that have evolved historically and through different theoretical orientations. I do not intend to get into the debates regarding what humanism is but am more focused along the lines of *what it represents* and *how it has been moulded* in both beneficial ways (for some) and disastrous ways (for Others). For further reading on this history and philosophical development, review *The Oxford Handbook of Humanism* (Pinn ,2019).

Due to the pervasive and uneven force of conquest and colonial expansion, this ontological rupture did not overturn existing relations of power or social hierarchy overnight. As Lorenzo Veracini (2023: 20) emphasizes, "the first global colonial 'wave' relied on and exploited already existing networks of subjection". With great historical specificity, Veracini argues that:

"There were precedents before modern blue water colonialism and there was globalisation before the onset of colonial globalisation. The 'precolonial' commercial middlemen interacting with Europe were Swahili, Arab, Gujarati, Malabari, Malay and Chinese merchants. The Crusader states were 'protocolonial'; the Italian maritime republics controlled semi-sovereign 'factories' in the Levant, that is, overseas, and outside of Europe. Pisa's commune, for example, a sovereign entity that is born at sea and then 'lands' and becomes territorialised, led a 'crusade' against the Balearic Islands before the Crusades, then held what could be seen as the first European 'colony' in Sardinia. The expansions of the Vikings in the north Atlantic was in many ways colonial, and so was the Christian Reconquista of the Iberian Peninsula that began in the eleventh century. But with the 'discovery' and conquest of the Atlantic Islands, the Canary Islands before the other ones, the relationships involved in domination become recognisably 'colonial' [...] In the Canary Islands, Indigenous genocide was followed by re-population with settlers. In Madeira, an archipelago originally uninhabited, a mixed population with settlers and slaves was planted; in Cabo Verde, the population consisted mainly of imported slaves; in the Azores there was a mixed colonial mode. Madeira would be an early laboratory of plantation colonialism. It became a model that was then exported to Brazil and from there it would go global. In the Canary Islands there were experiments with the *encomienda* system of labour extraction. This model would be later exported to the Americas, in Hispaniola first, the island that today is shared by Haiti and the Dominican Republic, and then in the continental mainland. In turn, this system of labour extraction had antecedents in Moorish Spain and in the fourteenth-century sugar plantations of Cyprus" (Veracini 2023: 10).

What Veracini's account makes clear is that the emergence of modern colonial relations did not take place within an epistemic or empirical vacuum. Rather, these relations unfolded within a world *already* structured by hierarchies, religious and racial classifications, and long-standing forms of domination which the colonial system inherited and exploited.

In this context, the significance of the Renaissance humanist turn, for the sake of this project, lies in how an already hierarchical and racialised world came to be reinterpreted through new epistemic criteria. As previously discussed in Chapter 7, racial differentiation and exclusion were already central to the justification of conquest and domination, even when articulated through a religious discourse. What begins to shift in the early modern period is not the presence of a racial logic, but the framework through which that logic is rendered intelligible, authoritative, and durable. The gradual erosion of theocentric ontologies generates a need to redefine what it means to be human outside of divine determination.

It is within this epistemic climate that the figure of "Man" is produced as a secular category. Within the structures of knowledge that begin to find their institutional form during this period, Europe does not simply encounter an expanding world, but comes to understand itself as the privileged vantage point from which that world could be ordered, interpreted, and known. What shifts here is not the existence of hierarchy or domination, but the epistemic conditions through which such relations become intelligible and justified. As Wallerstein and Lee (2002) note in their discussion of the modern structures of knowledge, the rise of empirical and scientific modes of knowing did not simply expand knowledge of the world but reorganized the criteria by which knowledge was deemed valid and credible. What this reorganization leaves unexamined, however, is how those criteria were themselves constituted within and shaped by the colonial conditions of their production.

This moment does not mark the discovery of some universal human essence, but the historical invention of a specific kind of human. As Michel Foucault (1966) has argued,

"Taking a relatively short chronological sample within a restricted geographical area - European culture since the sixteenth century - one can be certain that man is a recent invention within it [...] In fact, among all the mutations that have affected the knowledge of things and their order, the [...] only one, that which began a century and a half ago, has made it possible for the figure of man to appear. And that appearance [...] was the effect of a change in the fundamental arrangements of knowledge."

The invention of Man is not an abstract philosophical shift, but a reconfiguration of the structures of knowledge through which the human itself became intelligible outside of theology. What Foucault identifies as a transformation in the "fundamental arrangements of knowledge" marks the emergence of a new epistemic figure that stands at the centre of

modern Western thought. Crucially, this figure does not emerge in a world devoid of hierarchy and differentiation but rather it arises within an expanding colonial world already structured through asymmetrical relations of power, religiously articulated difference, and increasingly racialised forms of classification. Consequently, the invention of Man names a historically specific solution to the problem of how to ground claims about the human once theological certainties began to fracture, and not as a neutral category.

It is at this point that Sylvia Wynter's intervention becomes indispensable. Wynter (2003) extends Foucault's analysis of the epistemic reorganization of knowledge by situating the invention of Man within a longer and broader history of how human orders have rendered themselves intelligible. Where Foucault identifies transformation in the "fundamental arrangements of knowledge" that displaces theology and installs Man at the centre of modern epistemes, Wynter asks how such epistemic figures function as governing codes through which entire social orders define what it means to be human. In doing so, she shifts the analysis away from epistemic structures alone to the cultural-ideological mechanisms through which epistemic authority is naturalized and lived.

For Wynter, the invention of Man names the consolidation of a new "descriptive statement" of the human. This concept refers not to an abstract philosophical proposition, but to the dominant representational framework through which a given order organizes its understanding of being, value, and legitimacy. As she explains, such descriptive statements have historically been anchored in cosmological narratives that align social hierarchy with an external and seemingly objective order. Wynter draws on the work in archaeo-astronomy to illustrate the depth and durability of this practice, noting that:

"[...] all human orders - from the smallest society of nomadic hunter-gatherers, such as the San people of the Kalahari, to the large-scale societies of Egypt, China, the Greeks, and the Romans - have mapped their 'descriptive statements' or governing master codes on the heavens, on their stable periodicities and regular recurring movements (Krupp 1997). Because, in doing so, they have thereby mapped their specific criterion of being human, of what it was 'to be a good man and woman of ones kind', onto the physical cosmos, thereby absolutizing each such criterion; and with this enabling them to be experienced by each order's subjects as if they had been supernaturally (and, as such, extrahumanly) determined criteria, their respective truths (Davis 1992)" (Wynter 2003: 271).

What is decisive in this passage is not simply the claim that social orders project their values onto the cosmos, but that this projection functions to absolutize historically

specific criteria of being human. By grounding their descriptive statements in what appears as an external, stable, and universal order, societies render particular hierarchies and norms as necessary rather than contingent. These criteria come to be experienced not as social constructs, but as truths that exceed human authorship and as such, above contestation. In this sense, descriptive statements operate as the cultural-ideological core of a social system, organizing moral worth, social hierarchy, and political legitimacy through a shared and seemingly self-evident account of what it means to be human.

Wynter's work allows us to see the invention of Man as one such descriptive statement, albeit a historically distinctive one. The modern shift away from theocentric ontologies does not eliminate the need for an absolutizing framework. Rather, it relocates it. Where earlier populations mapped their criteria of being human onto a divinely ordered cosmos, modernity grounds its descriptive statement in Nature, Reason, and rational knowledge. The authority once attributed to God is transferred onto a particular conception of the human, now defined through its presumed capacity for rational thought, abstraction, and mastery over the natural world.

It is here that Wynter converges with and extends Foucault's analysis. Foucault (1966) traces the emergence of Man as an epistemic figure produced through a reorganization of knowledge that makes the human both subject and object of inquiry. Wynter deepens this account by showing how this figure comes to function as the governing master code of modernity. Man is not merely an object of knowledge but the normative standard through which knowledge itself is authorized. The invention of Man thus names the consolidation of a secular descriptive statement that defines the human in ostensibly universal terms while remaining anchored in the particular historical experience of Western Europe.

Such a reflection has implications for how race is to be understood within modern epistemic regimes. If descriptive statements operate by absolutizing specific criteria of being human, then the modern descriptive statement of Man necessarily produces gradations of humanity. The overrepresentation of Man as if it were the human as such establishes a hierarchy in which those who approximate its criteria are recognized as fully human, while others are positioned as deficient, incomplete, or closer to a state of Nature. Racialised populations are not excluded accidentally from the category of Man; they are constitutively positioned within the descriptive statement as subhuman. From this perspective, race cannot be treated as an appended to an otherwise neutral epistemic order nor can it be reduced to a secondary distortion of universal Reason. Rather, racial differentiation is internal to the functioning of the modern descriptive statement itself. The invention of Man is simultaneously the invention of a normative human and the invention

of a scale of being through which humanity is hierarchically distributed, a hierarchy which is not constructed in isolation from the colonial and racial ordering of the world.

Wynter's analysis allows us to specify what remains underdeveloped in Foucault's account. Whilst Foucault demonstrates how Man emerges as a central figure within modern knowledge, he does not fully address how this figure becomes overrepresented as universal within a world already structured by conquest, enslavement, and colonial domination. Wynter makes explicit that the epistemic rupture identified by Foucault is articulated through a broader cultural-ideological matrix that stabilizes Western dominance by naturalizing its conception of the human. The invention of Man thus functions as a historically specific solution to the problem of grounding truth and meaning after the decline of theological authority, but it is a solution forged within, and dependent upon, an expanding colonial world. It is within this humanist epistemic formation, and through the racial logics embedded within its descriptive statement of the human, that the conditions of possibility for the Cartesian Subject are established. It is to the construction of that Subject, and to the racial logics it carries into the epistemic order of modernity, that the following section now turns.

### 8.3. Descartes and the Construction of the Cartesian Subject

The preceding section established that the invention of Man marks a decisive reconfiguration in which claims about the human are grounded outside of theology, within Reason, Nature, and secular knowledge, and that racial differentiation is internal to the functioning of this modern descriptive statement rather than an external distortion of it. It is within this epistemic context that the construction of the Cartesian Subject is situated as a decisive articulation within the emerging structures of knowledge. Classically, Enlightenment and humanist philosopher René Descartes holds a foundational position within Enlightenment philosophy and modern epistemology. Descartes represents what has been described as the 'ground zero' of Western intellectual traditions, the moment at which the modern relationship between the knowing subject and the world is fundamentally reconstituted.

Descartes, in an attempt to establish "one indisputable fact from which all other truths could be determined" (Beetz 2016: 10), was able to conclude that he is a "thing that thinks" (Descartes 1996: 19). It is this "thing that thinks" that is separate from the material world and devoid of outside influence and, therefore, fully autonomous (Beetz 2016: 10-11; Negri 2007). As Descartes states: "Thinking? At last, I have discovered it - thought; this alone is inseparable from me. I am, I exist - that is certain. But for how long? For as long as I am thinking" (Descartes 1996: 18; Beetz 2016: 10). The well-known formula

*cogito ergo sum* ("I think, therefore I am") is foundational in the articulation of the autonomous Cartesian Subject (Beetz 2016: 10; Heartfield 2006).

However, at a more fundamental level, there is a problem concerning how Descartes' rationalization is self-fulfilling. As Anibal Quijano (2007) states, for Descartes, the European and early modern/rational "subject is a category [which] constitutes itself in itself and for itself, in its discourse and in its capacity of reflection" [emphasis added] (172). In other words, Descartes, through his own rationalizations and subjectivity, constructed the theory and himself as a Subject. As such, it can only refer to an isolated individual, an individual without outside influence and only through his own thought processes. Yet, this individual is not truly isolated. The appearance of isolation is itself a privileged effect of the structures of knowledge within which the Cartesian Subject is constituted. While Descartes presents the Subject as self-grounding and autonomous, capable of securing truth through reflection alone, this autonomy is only intelligible within a historically specific epistemic context. The thinking Subject who constitutes itself 'in itself for itself' does not emerge prior to the social and historical conditions of European modernity, but through them.

This point becomes especially clear when Descartes is situated within the broader historical moment in which European modernity was taking shape. As previously discussed, the displacement of theological authority and the rise of secular reasoning occur alongside European expansion and the consolidation of a world-system structured through asymmetrical relations of power. As Anibal Quijano (2007: 171-172) states,

"During the same period as European colonial domination was consolidating itself, the cultural complex known as European modernity/rationality was being constituted. The intersubjective universe produced by the entire Eurocentered capitalist colonial power was elaborated and formalized by the Europeans and established in the world as an exclusively European product and as a universal paradigm of knowledge and of the relation between humanity and the rest of the world."

What this historical conjuncture makes visible is that the epistemic authority attributed to Reason, abstraction, and universality is not produced in isolation from these developments. Rather, it emerges within a world already ordered through hierarchical distinctions between Europe and the non-European world. Descartes may sever the knowing subject from God (and become God-like in doing so), but this severance does not

entail a detachment from the historical structures that define who can legitimately occupy the position of the knowing subject.

It is in this sense that the autonomy of the Cartesian Subject is self-fulfilling. The subject is able to posit itself as universal precisely because its particular historical location remains unmarked. As Charles W. Mills (1997) reminds us, racial privilege operates most effectively when it is rendered invisible. The Cartesian Subject appears abstract and general not because it is free from historical and social location, but because the location it inhabits is normalized as the standpoint of humanity itself. The claim to universality is therefore secured through exclusion rather than inclusion, through the absence of those who fall outside the epistemic horizon of European modernity. Race, already embedded within the juridical, theological, and epistemic practices traced in Chapter 7 through Robinson, Virdee, and Heng across the *longue durée* of European history, is carried into the Cartesian *cogito* as an invisible foundation: the racial ordering of the world is absorbed into the claim to a non-situated, God-eyed view of knowledge, rendered intelligible and authoritative as the universal standpoint from which all other knowledges and peoples are measured and found deficient.

A second and related problem emerges from this, namely the denial of pluralism and social totality. The Cartesian framework does not simply privilege the European subject, it renders non-European populations epistemically marginal or present only as objects of knowledge. As Quijano (2007: 173) states:

"the 'Other' is totally absent; or is present, can be present, only in an objectivised mode. The radical absence of the 'other' not only postulates an atomistic image of social existence in general; that is, it denies the idea of social totality. As European colonial practice was to show, the paradigm also made it possible to omit every reference to any other 'subject' outside the European context, i.e., to make invisible the colonial order as totality, at the same moment as the very idea of Europe was establishing itself precisely in relation to the rest of the world being colonized."

There is certainly a lot to unpack in this passage. First, is the manner in which this form of self-liberation and self-definition is historically afforded to European, and more specifically, White individuals. It is only the White European who could be a subject in the full epistemic sense, whilst those outside of Europe are left to occupy the position of the "objectivized" (Quijano 2007; Grosfoguel 2002). Quite problematically, throughout modernity it is the colonizers, much like Descartes, consistently affording themselves the capacity for identity formation and liberation, whilst non-European populations are

relegated to objects within European structures of knowledge, classificatory systems, and civilization hierarchies. As Quijano (2007: 173-174) further articulates,

"The emergence of the idea of the 'West' or of 'Europe', is an admission of identity - that is, of relations with other cultural experiences, of differences with other cultures. But, to the 'European' or 'Western' perception in full formation, those differences were admitted primarily above all as inequalities in the hierarchical sense. And such inequalities are perceived as being of nature: only European culture is rational, it can contain 'subjects' - the rest are not rational, they cannot be or harbour 'subjects'. As a consequence, the other cultures are different in the sense that they are unequal, in fact inferior, by nature. They only can be 'objects' of knowledge and/or of domination practices [...] From that perspective, the relation between European culture and the other cultures was established and has been maintained, as a relation between 'subject' and 'object'."

According to Quijano, non-European populations are structurally positioned as incapable of self-liberation and self-definition within the epistemic frameworks of European modernity. Not only does this lead to their cultures being discredited or outright destroyed, but it also undermines their capacity to appear as legitimate sources of knowledge or as bearers of subjectivity. Yet again, there is a fundamental discreditation and systematic misrecognition of populations and cultural traditions that do not align with European rationality and norms of 'civility'.

In sum, what emerges from this analysis is that the Cartesian Subject is self-fulfilling on multiple fronts. It is rendered authoritative through the very structures of knowledge that emerge alongside European modernity, yet it is defined through its ignorance of the Other, and it is through this ignorance that race is carried into the *cogito* as an invisible foundation. The supposed autonomy and rationality of the Cartesian Subject becomes the implicit frame of reference against which the non-European and non-White world is misrecognized, evaluated, and positioned as deficient. What the analysis of this chapter has established, tracing from the humanist invention of Man through to the Cartesian consolidation of the rational Subject, is that race is not codified within the structures of knowledge as an external imposition but is constitutive of their very foundations.

To conclude, the analysis pursued across this chapter has established that race is foundational to the structures of knowledge of the MW-S. The Cartesian Subject, which this chapter has established as the epistemic epicentre of Western structures of knowledge,

is far from a neutral achievement of secular Reason. Its epistemological foundations are inseparable from the colonial and racial logics through which they were produced. The displacement of theological authority by Renaissance humanism and the Enlightenment did not dissolve existing hierarchies of humanity but rearticulated them through the secular registers of Reason, Nature, and Civilisation. The humanist invention of Man consolidated a descriptive statement of the human that overrepresented a historically and geographically specific experience as if it were universal. The overrepresentation of Man as if it were the human as such established a hierarchy in which those who approximate its criteria are recognised as fully human, while others are positioned as deficient, incomplete, or closer to a state of Nature. Racialised populations are not excluded accidentally from the category of Man but are constitutively positioned within it as those whose very presence defines the boundaries of the universal claim. The invention of Man is simultaneously the invention of a normative human and the invention of a scale of being through which humanity is hierarchically distributed (Wynter 2003; Grosfoguel 2002).

It is within this epistemic context that the construction of the Cartesian Subject must be situated. The Cartesian Subject is self-fulfilling on multiple fronts. It is rendered authoritative through the very structures of knowledge that emerge alongside European modernity, yet it is defined through its ignorance of the Other, and it is through this ignorance that race is carried into the *cogito* as an invisible foundation (Grosfoguel 2002; Quijano 2007). The supposed autonomy and rationality of the Cartesian Subject becomes the implicit frame of reference against which the non-European and non-White world is misrecognized, evaluated, and positioned as deficient. The dualisms that consolidate through Cartesian thought, between mind and body, subject and object, the civilised and the 'barbarian', are not mere philosophical abstractions but the epistemic architecture through which European universalism and racial hierarchy are simultaneously organised and naturalised (Wynter 2003; Balibar 1991; Heartfield 2006).

What the analysis of this chapter has established, tracing from the humanist invention of Man through to the Cartesian consolidation of the rational Subject, is that race is not a secondary effect of the world-system but a foundational logic embedded within the very structures of knowledge through which the geoculture of the world-system acquires its authority (Grosfoguel 2002; Wynter 2003). The cultural hegemony that Wallerstein identifies as the constitutive role of centrist liberal geoculture rests upon epistemic foundations through which racial hierarchy was rendered intelligible, legitimate, and self-evident long before it was institutionalised within the political and legal apparatus of liberal democratic orders. It is this epistemic formation, and its translation into liberal political discourse and the figure of the Citizen, that Chapter 9 now traces directly.

## 9. Race and Liberal Political Discourse: From the Cartesian Subject to the Citizen

The analyses developed across Chapters 7 and 8 established that race cannot be adequately understood as a secondary ideological effect of capitalist development, nor as a residual cultural logic that merely stabilizes economic relations. Chapter 7 demonstrated that racial differentiation not only predates capitalist consolidation but operates through religious, juridical, and epistemic domains that cannot be reduced to economic causality alone, establishing race as a historically durable and structurally formative logic rather than a derivative consequence of the political economy (Robinson 1983; Virdee 2023; Heng 2018). Chapter 8 deepened this critique by turning to the structures of knowledge themselves, demonstrating that the humanist invention of Man and the consolidation of the Cartesian Subject are not neutral epistemic achievements but are entangled with a racially particular conception of the human that presents itself as universal whilst embedding gradations of humanity within the very categories through which the world is made intelligible (Wynter 2003; Grosfoguel 2002; Quijano 2007). The temporal and conceptual foreclosure that W-SA imposes on race was shown to have consequences that extend well beyond historical periodisation. Race is foundational to the structures of knowledge themselves, and it is through those structures that the geoculture of the world-system acquires the epistemic authority through which racial hierarchy is rendered natural and legitimate.

As previously discussed in Chapter 6, the world revolution of 1968 brought the centrist liberal geoculture into crisis, destabilising the very categories through which political belonging and social legitimacy had been organised, and exposing the racialised and colonial foundations upon which the figure of the Citizen had been constructed (Wallerstein 2003; 2004a; 1995). What became visible in 1968, and what the identity-based movements of that period forced into the open, was that the Citizen had always been predicated upon a particular image of the human: one that was rational, male, and White, and that those who did not conform to this image were relegated to the status of those lacking virtue, civilization, or the capacity for self-governance. Chapter 6 named this as the colonial underside of European universalism. Chapter 9 now traces its philosophical production, examining how the tradition of liberal political thought that runs from Hobbes through Kant elaborated the criteria through which the active Citizen was defined and through which those positioned outside it were systematically excluded (Balibar 1991; Wallerstein 1991). The focus here is not liberalism as an abstract political philosophy of rights, nor as a purely emancipatory tradition, but as a political discourse concerned

fundamentally with order, authority, and the management of social difference. Liberalism emerges in a historical moment defined by the erosion of theological authority in governance, the consolidation of sovereign power, and the expansion of colonial exploitation (Wallerstein 1995; 2004a). As such, it cannot be separated from the problem of how order is produced, justified, and maintained within a world increasingly expanding and interconnecting.

The central claim of this chapter is that liberal political discourse does not merely inherit a racially structured world but actively participates in its reorganisation (Goldberg 1993; Mills 1997). The same concepts that promise liberty, security, and political inclusion also function to demarcate the boundaries of the political, distinguishing between those deemed capable of self-rule and those positioned as threats to order, translating the epistemic hierarchies examined in Chapter 8 into political distinctions between the civilised and the 'savage', the political and the non-political. In tracing this argument through the liberal tradition from Hobbes through Kant, and drawing it together through Balibar's concept of equaliberty, the chapter demonstrates that the Citizen is not the failed universal of a liberalism that has not yet fulfilled its promises, but the political form through which the racial organisation of the modern world-system is formalised and reproduced.

### 9.1 Liberalism and the Search for Order

The preceding chapter traced the epicentre of Western structures of knowledge through the consolidation of the Cartesian Subject and the humanist invention of Man (Wynter 2003; Grosfoguel 2002; Quijano 2007). Chapter 9 follows that epistemic analysis into the domain of political discourse. If the Cartesian Subject establishes the conditions under which the human becomes intelligible as a rational and autonomous knower, liberal political theory addresses the problem of how such a Subject can be governed, restrained, and ordered. The transition from epistemology to politics is therefore not incidental but necessary. The modern political problem of order emerges precisely at the moment theocentric authority begins to lose its capacity to guarantee social cohesion, and it is at this moment that liberal political discourse takes up the question of how order is to be produced, justified, and maintained through human rather than divine authority (Wallerstein 1995; 2004a; Balibar 1991).

Zygmunt Bauman (1990) and Stephen Collins (1989) have argued that Thomas Hobbes (1588-1679) should be used as a practical "birthmark" of a modern consciousness, modern society, modern liberalism, and this ambiguous search for social and political order. Of course, Hobbes does not inaugurate liberalism as a settled doctrine of rights or

freedoms, but he provides one of the earliest systematic attempts within the West to resolve the problem of social order once divine authority can no longer guarantee it. As Collins states:

"Hobbes understood that a world in flux was natural, and that order must be created to restrain what was natural [...] Society is no longer transcendently articulated reflection of something predefined, external, and beyond itself which order exists hierarchically. It is now a nominal entity ordered by the sovereign state which is its own articulated representative [...] order was coming to be understood not as natural, but as artificial, created by Man. And manifestly, political and social [...] Order must be designed to restrain what appeared ubiquitous [...] Order became a matter of power, and power a matter of will, force and calculation [...] Fundamental to the entire reconceptualization of the idea of society was the belief that the commonwealth, as was order, was a human creation" (Collins cited in Bauman 1990: 163).

As Collins and Bauman argue, Hobbes is sensitive to the evolving social hierarchies and the power vacuum left when religious hegemony began to lose its stature. It is through this newfound power of Man that there was a need to construct a political order that would restrain "what was natural." Indeed, the problem of order is central to Hobbesian theory and that of political discourse more generally. Yet we must also come to understand what "order" represents to Hobbes. According to Bauman, order is not aimed against an alternative order, nor is it a competitive struggle between varying articulations of social order (Bauman 1990: 164). Order in this sense stands within a dialectic of order and chaos, between a "state of nature" and civil society, and it is within this search for order that Hobbesian contract theory finds its origins.

In Hobbes' (1651) most notorious work *Leviathan*, he begins his political treatise by articulating his conception of human nature and the human within nature. Hobbes presents what Thornton (2005) labels as 'one of the most famous quotations from the history of political philosophy':

"Hobbes described the life of human beings in the state of nature as 'solitary, poor, nasty, brutish and short'. In this natural condition human beings lived alone in a state of equality, constant fear of death, war, and general insecurity. It was a state in which there was no dominion, no law, and no property. If human beings were reasonable, they would soon conclude that it was a state that was incompatible with

their ultimate aim to avoid death, and then they would wish to leave it. For Hobbes, the state of nature was a logical account of the origins of society, but it was also a constant recurring possibility, because it was any period of time in which a society lacked a common power to keep order" (Thornton 2005: 1).

Drawing on Thornton's analysis of Hobbes' *oeuvre*, the individual is pulled in many directions by both good and evil, which are a simplification of an individual's natural appetites and desires. Within this contention of forces, Hobbes negates the primacy of the good, that is, the greatest good (*summum bonum*). Taking into consideration the plurality of human desires and the intensity with which individuals would compete for their own pleasures, the only result would be continuous civil war. It is within this state of nature, a chaotic war of all against all (*bellum omnium contra omnes*), that it is not the greater good that becomes the focus, but fear of the greatest evil. As such, it is not the desire for the *summum bonum* that has primacy, but the fear of the greatest evil (*summum malum*). Hobbes argues that it is this constant state of fear within the state of nature, where chaos and violence reign supreme, that the very origins of political reasoning can be found. It is this fear that leads humanity to give up a portion of their natural freedom and liberties and place restraints upon themselves through a social contract, a transference of power to a sovereign, which all agree to be ruled upon, that creates the very foundations of civil society (Thornton 2005).

Of course, there are debates on whether the state of nature is an actual historical phenomenon with specific empirical references. As Thornton (2005: 1-2) further articulates,

"In both the *Elements of Law Natural and Politic*, and *De Cive*, Hobbes did not claim that his state of nature had existed at a specific point in history, only that there were both past and present people who had lived, and were now living, in that condition. In *Leviathan*, Hobbes admitted that the state of nature was never generally so, although again there were some people who were living in that awful state now - i.e., native Americans".

What is striking in Hobbes' discussion is not simply that the state of nature functions as a conceptual abstraction, but that it is repeatedly illustrated through seemingly concrete examples. While the state of nature is presented as a universal condition in which all humans could, in principle, find themselves, Hobbes' empirical references do not draw symmetrically upon European and non-European contexts. Instead, non-European peoples

are invoked as existing exemplars of the very condition that European society is said to have transcended. This asymmetry raises a critical contradiction internal to Hobbes' work: universality is asserted as a principle, yet its empirical grounding rests upon the repeated positioning of non-European populations as already occupying the space of disorder, pre-political life, and social absence (Thornton 2005; Mills 1997).

It is within this contradiction that the problem of race emerges through its apparent absence. In these passages, Hobbes makes explicit judgements about non-European people, "native Americans" in this instance, while race itself remains unnamed as a category of analysis. As Charles W. Mills (2022) has argued, this silence is not neutral but reflects the extent to which racial hierarchy functions as an unspoken given within early modern political thought. The omission of race does not signal its irrelevance but its naturalization. Race does not appear as a concept to be theorized, but as a condition that need not be named in order to structure who counts as fully political and who does not. As Mills (1997: 65) makes clear,

"I think this minor mystery can be cleared up once we recognize that there is a tacit racial logic in the text: the literal state of nature is reserved for nonwhites; for whites the state of nature is hypothetical. The conflict between whites is the conflict between those with sovereigns, that is, those who are already (and have always been) in society. From this conflict, one can extrapolate (gesturing at the racial abyss, so to speak) to what might happen in the absence of a ruling sovereign. But really we know that whites are too rational to allow this to happen to them. So the most notorious state of nature in the contractarian literature - the bestial war of all against all - is really a nonwhite figure, a racial object lesson for the more rational whites, whose superior grasp of natural law [...] will enable them to take the necessary steps to avoid it and not to behave as 'savages'".

Mills' account of the tacit racial logic in Hobbes further supports what the analysis has argued: that the universalism asserted at the level of principle is consistently undone at the level of exemplification and assumption. The state of nature is formally available to all, but its literal referent is the non-European world. The war of all against all is formally a hypothesis about human nature in the absence of sovereign authority, but its empirical anchor is the figure of the 'savage' people in many places of America. This is not an accidental inconsistency but the structural logic through which liberal political discourse simultaneously proclaims universality and enacts racial differentiation. The condition of permanent pre-political existence that Hobbes' state of nature names, the condition of

disorder, incapacity, and racial exclusion from civic standing, is always already attributed to non-White populations in his account. Race structures the underlying logic of Hobbesian political theory from within, without ever being named as a category requiring theorization. Its naturalization is precisely the measure of its foundational status.

This is the paradox which David Theo Goldberg (1993) identifies at the heart of modern political thought. Thinkers such as Hobbes consider race as a morally irrelevant category whilst simultaneously participating in a broader modern discourse that proliferates racial distinctions and the exclusions they authorize. The liberal paradox, according to Goldberg, is that while "modernity commits itself progressively to idealized principles of liberty, equality, and fraternity, as it increasingly insists upon the moral irrelevance of race, there is multiplications of racial identities and the sets of exclusions they prompt and rationalize, enable and sustain" (Goldberg 1993: 6). In other words, "race is irrelevant, but all is race" (6). The state of nature is supposed to represent the original conditions of all men, and the adoption of the social contract is intended to affect them all in the same way (Mills 2022: 12), yet this formal universality sits uneasily with the way the state of nature is applied in practice. It comes to be disproportionately associated with those who do not conform to Hobbes' conception of European civility, civilization, or moral capacity, a disproportionality that Mills develops directly:

"The non-European state of nature is thus actual, a wild and racialised place that was originally as cursed with a theological blight as well, an unholy land. The European state of nature, by contrast, is either hypothetical or, if actual, generally a tamer affair, a kind of garden gone to seed, which may need some clipping but is really already partially domesticated and just requires a few modifications to be appropriately transformed - a testimony to the superior moral characteristics of this space and its inhabitants" (Mills 2022: 46-47).

According to Mills, there is a fundamental difference in the state of nature between European and non-European populations, a difference that in its most extreme form amounts to a denial that Europeans ever truly occupy a state of nature at all, except as a conceptual or temporary condition. The European state of nature is understood as already partially domesticated, while any non-European population is cast as its inverse, figured as 'barbarians' or 'savages' representing constant states of civil war, uncontrolled desire, and social absence (Wallerstein 2004a; 1988; Bauman 1990). The state of nature is thus both racialised and embodied, not through explicit racial theorization but through the repeated patterns of embodied attribution through which the dangers of disorder and unrestrained

desire are displaced onto racialised populations, who come to personify the very condition that liberal political order seeks to overcome. Liberalism and social contract theory do not merely respond to these figures but help to constitute them as threats, shaping European responses of regulation, containment, and hostility. Mills further clarifies that Hobbes does not argue for a simple dichotomy between uncivilized and civilized, but for a developmental process that remains structured by racialised assumptions, in which different cultures are imagined as progressing through stages always filtered through a lens that positions European development as normative and authoritative. As Mills (2022: 13) explains,

"In the White settlers' state, its role is not primarily to demarcate the (temporarily) pre-political state of 'all' men (who are really White men), but rather the permanently pre-political state - or, perhaps better, non-political state (insofar as 'pre-' suggests eventual internal movement toward) - of non-White men. The establishment of society thus implies the denial that a society already existed; the creation of society requires the intervention of White men, who are thereby positioned as already sociopolitical beings. White men who are (definitionally) already part of society encounter non-Whites who are not, who are 'savage' residents of a state of nature characterized in terms of wilderness, jungle, wasteland. These the White men bring partially into society as subordinate citizens or exclude on reservations or deny the existence of or exterminate. In the colonial case, admittedly pre-existing but (for one reason or another) deficient societies - decadent, stagnant, corrupt - are taken over and run for the 'benefit' of the non-White natives, who are deemed childlike, incapable of self-rule and handling their own affairs, and thus appropriately wards of the state. Here the natives are usually characterized as 'barbarians' rather than 'savages', their state of nature being somewhat farther away (in comparison to Europe's)".

What is decisive here is that this distinction is not introduced as an explicitly racial claim, yet it nevertheless performs racialising work. The boundary between political and non-political life is articulated through ostensibly universal categories, yet it is stabilised through examples and assumptions that consistently position non-European populations on the side of disorder and incapacity. In this way, Hobbes' work sustains the appearance of universalism while reproducing a differentiated conception of humanity within its own conceptual architecture (Mills 1997; Goldberg 1993).

Hobbes' theorisation of the social contract therefore emerges not as a neutral or universal account of political order, but as one grounded in a selective conception of the human. While framed as a civilizational project to contain the chaos of the state of nature, Hobbesian order rests upon a binary between political and non-political beings that maps onto colonial distinctions between the 'civilised' and the 'savage'. The Cartesian Subject presupposed by Hobbes is imagined as rational, calculative, and capable of self-restraint, yet this figure is implicitly a White European and already situated within the bounds of political life. The state of nature is not merely a logical abstraction but a historically situated discourse that participates in the differentiation of humanity within liberal political thought, in which universality is asserted at the level of principle while exclusion is enacted at the level of exemplification. It is this conceptual foundation that Locke will inherit and reformulate, albeit through a different modality of liberal reasoning.

## 9.2. Locke, Rousseau, and Political Capacity

This section extends the analysis by tracing a crucial shift within liberal political discourse. Whereas Hobbes demarcates the boundary between political and non-political life, later liberal theorists increasingly reframe the problem in terms of political capacity, that is, the qualities through which the Subject may be recognized as fit for political participation. The question becomes not simply who is inside or outside political order, but which Subjects possess the attributes required to sustain it. Political life is no longer denied outright, but made conditional upon demonstrable forms of rationality, self-regulation, productivity, and moral competence. In this transition, exclusion is rearticulated not as absolute absence but as developmental insufficiency.

It is within this transformation that the paired interventions of John Locke and Jean-Jacques Rousseau become analytically central. Although their political philosophies diverge in significant ways, both thinkers operate within a shared liberal horizon in which political membership is mediated through the Subject's capacity rather than assumed as an inherent attribute of humanity. Locke approaches this problem through labour, property, and consent, grounding political legitimacy in the Subject's ability to appropriate, improve, and rationally manage both self and environment. Rousseau, by contrast, foregrounds moral development and civic education, treating political capacity as something that must be cultivated through discipline, socialization, and the internalization of collective norms. Yet despite these differences, both theorists contribute to a liberal discourse that differentiates humanity according to readiness for political life.

Crucially, this differentiation is not articulated through explicit racial categories. As in Hobbes, universality is maintained at the level of principle, while political capacity is

unevenly distributed in practice. The criteria that define political competence are presented as abstract attributes of the Subject, yet they emerge within a world already structured by colonial expansion, civilizational hierarchies, and entrenched assumptions about European development and authority. As a result, liberalism does not merely inherit a racially stratified world, but comes to refine its mechanisms of distinction by translating earlier exclusions between political and non-political life into graded assessments of capacity, maturity, and fitness for self-rule.

When read together, Locke and Rousseau mark a decisive moment in the development of liberal political thought. The liberal Subject is no longer simply secured against disorder, as in Hobbes, but comes to be evaluated, measured, and differentiated according to its political capacities. In this sense, political life becomes a status to be attained rather than a condition shared universally. The transition from Subject to Citizen is structured through a discourse of capacity that preserves the appearance of universality while reorganizing exclusion in more flexible and enduring forms. This refinement of political differentiation prepares the ground for the moralization of political hierarchy that will come to define later liberal thought and that will be examined in the following section.

Following Hobbes' articulation of political order as an artificial response to disorder, John Locke (1632-1704), writing in the *First and Second Treatises of Government* (1689-1690), reorients liberal political discourse toward the problem of political capacity. Where Hobbes locates the instability of political life primarily in the ever-present threat of disorder, Locke reframes the problem through the law of nature and the conditions under which moral obligation can be sustained. As Collins (1989) and Bauman (1990) both suggest, this shift must be understood within a broader transformation in which political order comes to be conceived as a human construction rather than a divinely guaranteed hierarchy. Locke inherits this problem but approaches it through reason rather than fear. The state of nature is no longer defined by insecurity alone, but by moral obligation grounded in rational self-command. Human beings are described as free and equal, bound by a law that teaches restraint, reciprocity, and mutual obligation. Locke's formulation of the law of nature pushes this shift further into structural form. As Locke (1690) writes in *The Second Treatise of Government*:

"The state of nature has a law of nature to govern it, which obliges every one: and reason, which is that law, teaches all mankind, who will but consult it, that being all equal and independent, no one ought to harm another in his life, health, liberty, or possessions: for men being all the workmanship of one omnipotent, and infinitely wise maker; all the servants of one sovereign master, sent into the world by his

order, and about his business; they are his property, whose workmanship they are, made to last during his, not one another's pleasure: and being furnished with like faculties, sharing all in one community of nature, there cannot be supposed any such subordination among us, that may authorize us to destroy one another, as if we were made for one another's uses, as the inferior ranks of creatures are for ours. Every one, as he is bound to preserve himself, and not to quit his station wilfully, so by the like reason, when his own preservation comes not in competition, ought he, as much as he can, to preserve the rest of mankind, and may not, unless it be to do justice on an offender, take away, or impair the life, or what tends to the preservation of the life, the liberty, health, limb, or goods of another" (Locke 1690).

The law of nature binds all human beings in principle, yet its authority depends upon the capacity to consult and act in accordance with Reason. Equality is affirmed, but rendered operative through rational self-command. The state of nature is not positioned outside morality, but as a condition in which moral restraint is unevenly sustained. Obligation is universal in form, yet precarious in practice. Political society arises not because humanity is divided, but because the capacities through which humanity governs itself are insecurely exercised.

Locke's account of political society and consent further develops this conditional structure. Political authority arises through voluntary agreement undertaken to remedy what Locke terms the inconveniences of the state of nature (Locke 1690). Consent presupposes a subject capable of recognizing obligation, understanding law, and binding oneself through rational commitment. Political legitimacy is therefore grounded in rational agency rather than submission to force. At the same time, this capacity cannot be assumed evenly in practice. Those unable to reliably govern themselves according to Reason remain within humanity, yet their political standing is rendered provisional rather than inherent. Equality persists as a formal premise, while political participation becomes conditional. This conditionalization is extended and intensified in Locke's theory of property, where political capacity becomes legible through practices of labour and improvement. Property arises when labour is mixed with Nature, thereby removing resources from the common and rendering them one's own (Locke 1690). Labour functions not simply as an economic activity, but as a moral practice through which discipline, foresight, and rational planning are demonstrated. Improvement becomes the criterion through which Nature is rendered useful and possession legitimate. Land that remains unimproved is positioned as failing to meet the demands of natural law. Political capacity is thus increasingly associated with practices of regulation, productivity, and self-management.

The developmental implications of this framework are not incidental. Forms of life are differentiated not according to inherent worth, but according to their orientation toward cultivation, accumulation, and long-term planning. Subsistence economies and non-monetized practices are not denied legitimacy, yet they are situated as limited in their political horizon relative to civil society and commercial order (Locke 1690). The criteria through which political life is recognized remain formally universal, even as their application differentiates populations through conduct. Differentiation operates through exemplification rather than explicit exclusion. Political capacity is measured rather than declared.

As Mills (2022) has emphasized, this universal framework relies upon asymmetrical exemplification rather than formal hierarchy. Locke repeatedly invokes Indigenous societies as empirical illustrations of peoples who remain in the state of nature due to their failure to appropriate and improve land according to European norms. Mills captures this tension when he notes that, for Locke, 'the state of nature is actual for non-Europeans, but largely hypothetical for Europeans' (Mills 2022). Europeans encounter the state of nature as a conceptual device, while non-European populations are represented as persistently located within it. The distinction is not articulated through racial taxonomy, yet it consistently maps political capacity onto European modes of life. Universalism is preserved, but it operates through a selectively applied conception of humanity. This structure is forced into sharper relief in Locke's reflections on slavery, where the limits of political capacity are tested directly. In the opening of the *First Treatise*, Locke offers a categorical denunciation of slavery, framing it as incompatible with moral and political life. He writes:

"Slavery is so vile and miserable an estate of man, and so directly opposite to the generous temper and courage of our nation, that it is hardly to be conceived that an Englishman, much less a gentleman, should plead for it" (Locke 1690).

Slavery is positioned not simply as unjust, but as incompatible with rational and civic virtue. Yet this repudiation rests upon a conception of humanity grounded in rational self-command. As Goldberg notes, Locke understands human beings as "free, and equally so, by virtue of equal endowment in and command by rationality" (Goldberg 1993: 206). Consequently, civility or rationality comes to function as the condition of both moral standing and political liberty.

As William Uzgalis (2017) has shown in his analysis of Locke's reflections on slavery, the tension that emerges here is not the result of incoherence or accidental

contradiction, but of the juridical structure through which slavery is theorized. Uzgalis emphasizes that Locke develops two distinct accounts of slavery: a theory of legitimate slavery grounded in just war and punishment, and a corresponding theory of illegitimate slavery defined by the unjust use of force. Crucially, neither account relies on biological difference or racial taxonomy. Instead, enslavement becomes intelligible through the withdrawal of political standing from those judged to have violated the law of nature. Consequently, slavery functions as a conditional suspension of political capacity rather than a denial of humanity itself. This distinction allows universal freedom to remain intact at the level of abstraction, while enabling differential application through juridical exception.

However, such a repudiation does not exhaust Locke's position. In the *Second Treatise*, slavery is reintroduced as a juridical possibility under specific conditions, most notably through the logic of just war. Slavery is framed not as a natural condition, but as a response to moral failure. As Goldberg draws out from Locke's argument, enslavement becomes justifiable "for persons otherwise facing death, as in a just war when the captor may choose to delay death of the captured by enslaving them" (Goldberg 1993: 206). Political standing is not denied as a matter of kind, but withdrawn as a consequence of action. What is suspended is political capacity, not humanity itself.

This logic is made explicit in Locke's insistence that individuals cannot alienate their own lives through consent. As he writes:

"For a man, not having the power of his own life, cannot, by compact, or his own consent, enslave himself to any one; nor put himself under the absolute, arbitrary power of another, to take away his life, when he pleases" (Locke 1690).

As Welchman (1995) emphasizes, this formulation restricts legitimate slavery to punishment rather than domination. Enslavement is located within the administration of justice rather than the organization of political society. Political capacity is withdrawn under specific conditions, rather than denied universally. The universal subject remains intact, even as political standing becomes conditional.

The tension between abstraction and application becomes sharper when Locke's political philosophy is situated within his involvement in colonial governance. As Goldberg observes, Locke articulated commitments to liberty, equality, and rationality while participating in the construction of colonial legal orders (Goldberg 1993: 206-207). Locke's role in drafting the Fundamental Constitutions of Carolina (1669) and the Instructions to Governor Nicholson of Virginia situates his theory of conditional slavery

within institutional practices that render exception durable. As Goldberg (1993: 206-207) writes:

"the former considered citizens to [...] have absolute power over their negro slaves and the latter considered the enslavement of Negroes justifiable because they were prisoners of a just war and had forfeited their own Life by some Act that deserves Death".

What appears in theory as a narrow juridical exception becomes, in practice, a stabilized condition. The language of rationality and moral judgment remains intact, even as its application becomes uneven and enduring. This is precisely the historical reality that Domenico Losurdo documents through his detailed examination of the liberal tradition. As Losurdo (2011) establishes, Locke was not only the last major philosopher to seek a formal justification for absolute and perpetual slavery but was personally invested in the slave trade and directly involved in the construction of colonial legal orders that granted property owners absolute power over enslaved persons. The philosophical framework of rational capacity, natural law, and conditional political standing that Locke developed was therefore produced within a world in which the freedom of the community of the free was secured by the organized unfreedom of those outside it. The abstract language of universality that pervades the *Two Treatises* is not the expression of a liberal ideal subsequently distorted by colonial practice; it is the philosophical legitimation of a political order in which the criteria of rational capacity and political standing were from the outset organized to delimit the community of the free.

Charles W. Mills (1997: 67-68) sharpens the racial logic of Locke's labour theory by demonstrating the connection between the philosophical argument and Locke's own institutional investments:

"Locke famously argues that God gave the world 'to the use of the Industrious and Rational,' which qualities were indicated by labor. So while industrious and rational Englishmen were toiling away at home, in America, by contrast, one found 'wild woods and uncultivated wast[e] [...] left to Nature' by the idle Indians. Though they share the state of nature for a time with nonwhites, then, their residence is necessarily briefer, since whites, by appropriating and adding value to this natural world, exhibit their superior rationality. So the mode of appropriation of Native Americans is no real mode of appropriation at all, yielding property rights that can be readily overridden (if they exist at all), and thereby rendering their territories

normatively open for seizure once those who have long since left the state of nature (Europeans) encounter them. Locke's thesis was in fact to be the central pillar of the expropriation contract - 'the principal philosophical delineation of the normative arguments supporting white civilization's conquest of America' [...] and not merely in the United States but later in the other white settler states in Africa and the Pacific [...] Yet Locke had investments in the slave-trading Royal Africa Company and earlier assisted in writing the slave constitution of Carolina" (Mills 1997: 67-68).

That the same philosopher who grounded political authority in natural equality and rational consent held investments in the slave-trading Royal Africa Company and assisted in writing the slave constitution of Carolina is not a biographical footnote. It is an analytical indicator of the extent to which the universalist claims of liberal political thought are maintained alongside and dependent upon the racial exclusions that the same philosophical tradition simultaneously organizes and denies. Locke's philosophical architecture does not merely receive a racially structured world and then accommodate it within categories that were originally neutral; it actively participates in producing the normative framework through which racial dispossession is rendered legitimate and the criteria through which political capacity is recognized are organized along racial lines that the formal universality of the argument cannot see because it is constituted through them.

Mills's intervention clarifies the durability of this structure without resolving it. Liberalism sustains freedom and equality at the level of abstraction while producing a political world in which those ideals are differentially realized (Mills 1997). In Locke's case, the conditionalization of political capacity allows slavery to be framed as exceptional without preventing its institutionalization. The universal subject persists, even as political standing is withdrawn in ways that become permanent. The contradiction is not external to liberalism, but internal to its mode of differentiation.

At this stage, Locke's political theory has not yet produced the figure of the Citizen, but what it has produced is a subject whose political intelligibility depends upon the enactment of rational capacity. Political life is neither universally guaranteed nor absolutely denied, but conditionally distributed. Humanity remains formally intact, while political standing is mediated through reason, labour, and moral judgment. This unresolved configuration marks the point at which political capacity becomes the central problem of liberal thought. As Wallerstein (2004a: 63) identifies in his analysis of the centrist liberal agenda developed in Chapter 4, the liberal conclusion was that only those who were educated and therefore specialists should exercise the role of citizen; others might

eventually be admitted to this role when they had received the proper education to permit them to join the society of rational, educated persons. Wallerstein presents this as the ideological tactic through which liberalism managed the dangerous classes while deferring the full realization of the modernity of liberation. What the analysis here makes visible is that this liberal tactic had a philosophical foundation already fully elaborated in Locke's account of rational capacity, political standing, and conditional inclusion. The logic of who is recognized as rational, who is not yet rational, and who may one day become rational is already operative in Locke's theory of property, labour, and consent.

Following Locke's understanding of political capacity as a condition mediated through reason, labour, and moral judgment, Jean-Jacques Rousseau further refines liberal political discourse by relocating the problem of political inclusion to the domain of moral development and educability. Where Hobbes secures political order against disorder and Locke conditions political standing upon rational self-command, Rousseau interrogates the moral foundations through which equality itself becomes distorted within civil society. Rousseau is frequently identified as one of the earliest liberal theorists to draw sustained attention to the internal contradictions of Enlightenment rationality and liberal political theory (Cook 1936; Curry 2009; Mills 2022). His critique does not abandon the ideals of freedom and equality, but instead questions the social and moral conditions under which those ideals are realized. Political capacity, in Rousseau's account, is no longer reducible to rational consent alone, but becomes inseparable from civic virtue, moral discipline, and collective development (Rousseau 1997). This shift intensifies rather than resolves the liberal tension between universal humanity and differentiated political standing.

It is critical to note that Rousseau does not yet theorize the Citizen as a juridical figure, but further refines the conditions under which the Subject becomes politically intelligible. The Subject functions as an epistemic figure prior to political incorporation, defined through standards of reason, coherence, and intelligibility rather than formal rights. Rousseau inherits this Subject and intensifies its differentiation by introducing moral development as a decisive criterion. Political equality is not denied in principle, but rendered contingent upon the successful cultivation of civic virtue and moral discipline. The distinction between Subject and Citizen therefore remains intact, even as Rousseau relocates the problem of political inclusion from rational calculation to moral capacity. What is at stake is not membership as such, but the conditions under which the Subject can be recognized as capable of political life.

Like Hobbes and Locke, Rousseau offers a moral condemnation of slavery in principle, framing it as incompatible with legitimate political authority. Yet contemporaries noted the limits of this critique when confronted with racialised servitude. Bernardin de

Saint-Pierre, a close associate and disciple of Rousseau, explicitly criticized Enlightenment philosophers for their evasions on colonial slavery. As he writes, "I am sorry, [...] that philosophers who combat abusers with so much courage, have hardly ever spoken of Negro slavery except to joke about it" (Saint-Pierre cited in Cook 1936: 294). This observation situates Rousseau within a broader Enlightenment discourse that denounced domination abstractly while leaving its colonial instantiations largely unexamined. Moral opposition remains largely discursive rather than political. Slavery appears as a violation of principle rather than as a constitutive condition of modern political order.

This contradiction is especially striking given Rousseau's reputation as a leading critic of inequality and his invocation of the *bon sauvage* as a philosophical device. As Cook notes, Rousseau, "the enemy of inequality, and foremost advocate of the doctrine of the '*bon sauvage*,'" nonetheless participates in exclusions that align with European and White communities (Cook 1936: 294). The 'savage' functions as a moral counterpoint through which European corruption is critiqued, rather than as a subject of political inclusion. Equality is affirmed at the level of abstraction, yet unevenly extended in practice. Humanity is universalized, while political capacity remains implicitly bounded. Rousseau's universalism thus operates through exemplification rather than equivalence.

The limits of this universalism are not merely theoretical, but are tied to the epistemic conditions under which Rousseau encountered non-European peoples. As Cook documents, Rousseau's knowledge of Black and non-European populations was mediated almost entirely through literary, philosophical, and second-hand sources. "Rousseau's contacts with the Negro were almost exclusively literary," Cook writes, noting that his travels were confined to Europe and that "he had never visited any of France's slave-holding colonies" (Cook 1936: 295). Even the rare moments of personal encounter are filtered through fear and exoticization. In *Confessions*, Rousseau recalls his fear of a figure he describes as "*un faux Africain*," emphasizing the man's "frightful gingerbread face" (Rousseau cited in Cook 1936: 295). Such descriptions reveal how the Enlightenment moral imagination remained structured by distance, projection, and affective differentiation.

Rousseau's conceptualization of non-European populations is further shaped by travel literature that dramatized encounters with difference. Much of the material informing *Discourse on the Origin of Inequality* draws upon accounts of "Orientals, Hottentots, Indians, and Patagonians" derived from travelogues and literary representations rather than sustained ethnographic engagement (Cook 1936: 296). Jean Morel similarly observes that Rousseau relied heavily on literary and theatrical sources rather than empirical observation when constructing comparative accounts of human development

(Morel cited in Cook 1936). These figures function less as political subjects than as philosophical contrasts. Difference becomes analytically productive while remaining politically inert. The 'savage' is mobilized to critique civilization without destabilizing the boundaries of political inclusion.

Within *Discourse on the Origin of Inequality*, Rousseau famously invites readers to "compare, without prejudice, the state of civilized man with that of savage man; and note, if you can... how many new doors to sorrow and death the former has opened" (Rousseau 1997). This comparison, however, does not culminate in political equivalence. Instead, it reinforces a developmental narrative in which moral and civic capacities are cultivated unevenly through socialization. 'Savage' life is depicted as morally innocent but politically incomplete, while civil society produces corruption alongside the conditions for moral agency and collective life. Political capacity thus becomes inseparable from education, discipline, and moral development rather than abstract humanity alone. As Mills (1997) demonstrates, the racial logic of this framework operates precisely through what is left unsaid. The 'natural savages' cited in Rousseau's account are consistently non-White, while examples of European savagery are restricted to feral children raised by animals. For Europe, savagery belongs to the distant past; for non-European populations, it remains the present condition:

"Rousseau's writings might seem to be something of an exception. After all, it is with his work that the notion of the 'noble savage' is associated [...] But a careful reading of the text reveals, once again, crucial racial distinctions. The only natural savages cited are nonwhite savages, examples of European savages being restricted to reports of feral children raised by wolves and bears [...] For Europe, savagery is in the dim distant past, since metallurgy and agriculture are the inventions leading to civilization [...] Both metallurgy and agriculture were unknown to the savages of America, who have always therefore remained savages [...] even what might initially seem to be a more open environmental determinism [...] degenerates into massive historical amnesia and factual misrepresentation, driven by the presuppositions of the Racial Contract" (Mills 1997: 68-69).

Read in continuity with Locke, Rousseau does not abandon the liberal logic of political capacity, but rearticulates it through a different register. Where Locke renders political standing legible through rational self-command, labour, and improvement, Rousseau shifts the locus of differentiation to educability, moral development, and civic discipline. In both cases, political life is not an inherent attribute of humanity, but a status

mediated through demonstrable capacities. The criteria change, but the structure remains: universality is preserved at the level of abstraction, while differentiation operates through the uneven distribution of capacity in practice. This continuity is essential for understanding how race operates as a formative logic rather than an ideological residue. Differentiation precedes explicit racial naming, emerging instead through developmental hierarchies embedded within liberal universality itself.

Political equality, in Rousseau's account, depends not merely on rational consent, but on the cultivation of civic virtue and alignment with the general will. As Mills (2022) argues, the contractarian tradition grounds its moral authority in the freedom and equality of all persons in the state of nature. Yet this foundation becomes unstable when the capacities required for civic participation are unevenly distributed. Rousseau intensifies this instability by tying political inclusion to educability and moral discipline. Equality persists as a normative ideal, while political capacity becomes a developmental achievement. Those situated outside European pathways of development remain human, yet politically incomplete. Differentiation operates not through explicit racial doctrine, but through the uneven distribution of civic virtue and educability. Race thus continues to function as a formative logic, structuring the conditions under which the Subject becomes politically intelligible.

Rousseau's emphasis on moral development thus marks a decisive refinement in the liberal discourse of political capacity without resolving the contradictions it generates. By rendering political readiness dependent upon educability, civic virtue, and moral discipline, Rousseau deepens the conditions under which the Subject becomes politically intelligible while preserving the formal universality of humanity. Political exclusion is no longer articulated through overt denial, but through assessments of moral development and readiness for self-rule. The problem of political capacity is thereby displaced from questions of order and productivity to questions of moral qualification. As Wallerstein (2003: 652) observes in his analysis of the French Revolution and the emergence of the Citizen, the republic of virtuous equals turned out to require the rejection of the non-virtuous; the very concept of virtue, which within Enlightenment thought came to represent the moral development of a person through the application of Reason, became operative as a barrier that managed who could and could not be full citizens. Rousseau's contribution to the liberal discourse of political capacity is precisely the philosophical elaboration of this logic: the cultivation of civic virtue and moral development as the conditions of political intelligibility that will later be institutionalized in the distinction between active and passive citizenship. Those whose modes of life fall outside European pathways of moral development remain formally human but substantively excluded from the community of

the free that the Citizen represents. It is this transformation, whereby universality is secured through moral criteria that simultaneously differentiate humanity, that finds its most systematic articulation in Kant.

### 9.3. Kant and the Moralization of Political Hierarchy

Immanuel Kant marks a decisive moment in the development of liberal political discourse, not because he introduces racial hierarchy into modern thought, but because he consolidates earlier liberal distinctions by insisting that political and moral capacity must become empirically intelligible. Where Hobbes, Locke, and Rousseau articulate differentiation primarily through conceptual abstraction, exemplification, and moral development, Kant advances a further requirement. Specifically, if moral law is to be truly universal, then the capacity to act in accordance with that law must be observable within the world or within Nature. Moral universalism, in Kant's formulation, cannot remain purely speculative or internally held because it must be capable of recognition, comparison, and assessment. As a consequence, the liberal Subject is therefore no longer intelligible solely through rational abstraction, but through the ways in which reason manifests itself empirically. This shift does not abandon universalism, but it fundamentally alters how difference is further apprehended within the structures of knowledge and political thought.

Kant's intervention must be situated within Enlightenment debates concerning human unity and difference. The question that occupied many theorists of his period was whether the observable differences between different human groups across the globe indicated distinct species or varieties within a single species. Kant's position was firmly within the monogenist camp which stood against those who argued that geographical isolation and differences in physical appearance signalled a fundamentally distinct species. Instead, Kant maintained that all human beings belong to a single species on the simple grounds that they are capable of producing healthy offspring together (Vial 2016: 8). This monogenist commitment supported the formal universality upon which his later moral philosophy depends, preserving humanity as a unified category at the level of species. Yet this unity does not resolve the question of difference, rather, it relocates it. Specifically, if all human beings belong to a single species, the question becomes not whether but how they differ, and it is within this relocation that the racial logic of Kant's framework takes its distinctive form. Difference is displaced from species membership onto questions of their disposition, their temperament, and their developmental capacity, such that humanity is unified in principle while capacity is distributed unevenly in practice (Vial 2016; Beecroft 2023).

This internal differentiation is made explicit in Kant's early writings on race, climate, and temperament. In *Observations on the Feeling of the Beautiful and Sublime* (1764) and *Of the Different Races of Human Beings* (1775), Kant develops a systematic classification of the different races became grounded more fundamentally in ones skin colour; identifying Whites, Blacks, Indians, and Kalmucks as distinct racial groupings (Bernasconi 2001; Yab 2021). These classifications are not presented as merely descriptive or contingent. Kant argues that climatic conditions shape biological constitution over time, producing enduring differences in temperament, comportment, and intellectual disposition. In this sense, climate functions as the mediating mechanism through which nature inscribes difference upon the human body, and it is through this naturalization of climate that racial difference is rendered stable and heritable rather than contingent or variable. Racial difference is thus rendered natural, visible, and durable, even as humanity remains formally unified at the level of species (Yab 2021; Beecroft 2023).

Kant would further elaborates this framework through the doctrine of *Charakteristik*, which draws upon the classical theory of temperaments including the melancholic, sanguine, choleric, and phlegmatic (Yab 2021). Within this account, these temperaments are not treated as individual personality traits but as enduring and racially distributed dispositions that structure ones moral character and cognitive capacity across populations. Furthermore, and importantly, Kant proposes that these inward dispositions are made outwardly legible through bodily appearance, such that skin colour functions as a visible sign from which moral and intellectual capacity can be inferred. Empirical observation is thereby elevated into the primary instrument through which human capacity is evaluated, and difference ceases to be merely conceptual. It becomes embodied, readable, and available to systematic assessment (Yab 2021; Vial 2016; Beecroft 2023).

The hierarchical implications of this framework are explicit in Kant's own writings. As Vial (2016) documents, Kant repeatedly ranks races according to intellectual, moral, and cultural capacity:

"The fact that someone was completely black from head to toe was clear proof that he was stupid"

"Humanity is in its greatest perfection in the white race. The yellow Indians already have lesser talent. The Negroes are far lower, and on the lowest stands a part of the American peoples"

"But that [American Indians] nature achieved no full suitability for any single climate, one can take from the fact that hardly any other ground can be given why this race - too weak for hard labour, too blasé for industrious [labour], and incapable of all culture despite the nearby sufficient example and encouragement - stands even lower than the Negro, which occupies the lowest of all the other rungs that we have named racial differences" (Kant cited in Vial 2016: 3)

What these passages reveal is the precise mechanism through which Kant's monogenist commitment coexists with an evolving racial hierarchy. Humanity is retained as a single species, but within that species emerges an ordered scale of capacity that is established through which White Europeans occupy the supposed apex while non-European populations are positioned as progressively less developed. This is not an incidental feature of Kant's early writings that his later supposed mature philosophy would correct or overcome. It is the empirical architecture through which capacity is distributed and through which the criteria of moral and political standing are pre-organized. The supposed universal Subject that Kant's moral philosophy will elaborate is not a neutral abstraction from this hierarchy; it is articulated within it (Vial 2016; Yab 2021).

To further this point, such early racial theorization does not disappear in Kant's later moral philosophy, even as its explicit vocabulary recedes. In both the *Groundwork of the Metaphysics of Morals* (1785) and *The Metaphysics of Morals* (1797), Kant articulates a universal moral theory grounded in rational autonomy. The moral Subject is defined as rational, self-conscious, and capable of legislating moral law for itself (Rauscher 1988). Moral obligation is derived from reason alone which is independent of inclination, culture, or tradition. As a consequence, universalism is secured at the level of principle. However, this universalism opens a new problem within the framework Kant has already constructed; if moral law binds all rational beings, then the capacity for reason must be recognizable within the empirical world, and the monogenist commitment to species unity must be reconciled with the racial hierarchy of capacity that Kant's earlier writings have established. The mechanism through which this reconciliation is achieved is the demand that rational capacity be rendered empirically observable (Rauscher 1988; Beecroft 2023).

This problem is addressed through Kant's insistence that reason must appear through culture. In *The Critique of Pure Reason*, Kant writes: "Metaphysics is the completion of all culture (*Kultur*) of human reason [it is] the culture of reason through objects such as might afford materials for the necessary concepts" (Kant cited in Rotenstreich 1989: 303). Culture functions here as the medium through which rational capacity becomes visible and assessable. Cultural objects, institutions, practices, and forms

of production are treated as evidence of moral and intellectual development. Reason is no longer assessed solely through abstract reflection but through its observable manifestations in the material world. Moral capacity becomes empirically legible through culture, and it is through this move that the racial hierarchy of Kant's early writings is carried into his political philosophy in a form that does not require explicit racial naming (Vial 2016; Beecroft 2023).

The implications of this move for the liberal differentiation of the Subject are decisive. Cultural production becomes the proxy through which moral development is assessed, and societies whose institutions, arts, sciences, and political forms align with European standards of rationality are understood as embodying higher moral capacity. Those whose cultural forms do not conform to this standard are positioned as less developed or incomplete in their realization of rational potential (Vial 2016; Rotenstreich 1989). Kant's mature moral philosophy does not explicitly invoke race at every turn, yet the evaluative criteria through which capacity is assessed remain organized through a European standpoint that his earlier racial writings have already established. The racial logic articulated in the human sciences is not abandoned when Kant turns to moral and political philosophy; it is translated into the universalist vocabulary of rationality, culture, and moral development, ultimately rendering it operative within a framework that presents itself as universal across the species.

At this point, Kant completes the liberal transformation of political differentiation into moral differentiation. Where Hobbes secures order against disorder, Locke conditions political standing upon rational self-command and labour, and Rousseau ties political inclusion to moral development, Kant elevates moral reason itself as the decisive criterion of political intelligibility. Humanity remains universal in principle, while capacity becomes unevenly applied in practice.

What remains to be traced is how this moral differentiation is translated by Kant into the domain of political philosophy proper and, in doing so, into the formal architecture of the Citizen. In the *Doctrine of Right within The Metaphysics of Morals* (1797), Kant develops a theory of republican citizenship that gives political and juridical form to the capacity differentials his earlier writings have constructed. The foundational distinction is between active and passive citizens. As Kant (1797: 46) writes,

"The only qualification for being a citizen is being fit to vote... But the ability to vote presupposes the independence of someone who, in addition to being a part of the commonwealth, also wills himself to be a part of it, that is, an active member of it [...] A journeyman employed by a merchant or craftsman; a domestic servant (as

distinguished from a civil servant); a minor... all these have no civil personality, and their existence is only, as it were, incidentally included in the state. The woodcutter whom I employ on my estate; the blacksmith in India who goes with his hammer, anvil and bellows from house to house to work iron, in contrast to the European carpenter or smith who can put the products of his work up as wares for public sale; the private tutor, as contrasted with the schoolteacher; the small farmer, as contrasted with the large farmer... are all mere subsidiaries of the commonwealth because they have to be under the direction or protection of other individuals, and so do not possess civil independence" (Kant 1797: 46).

What this passage renders explicit is the precise political form through which Kant's moral framework is translated into the architecture of the Citizen. Civil independence is the criterion through which active citizenship is defined and restricted. It requires the capacity to be one's own master, to subsist without dependence on the will of another, and to possess the material and rational conditions of self-governance. Those who cannot meet it are not excluded from humanity, nor from the passive rights of protection and security, but they are excluded from the legislative process that constitutes genuine political membership. The universality of moral law is preserved, while the political community of the republic is delimited through precisely those conditions of rational self-sufficiency and cultural production that Kant's earlier racial hierarchy has already organized. To be rendered, in Kant's own terms, incapable of culture and too weak for industrious labour is not only a description of developmental incapacity. It is also the specification of those who cannot possess civil independence and therefore cannot be active citizens. The racial hierarchy articulated in *Observations on the Feeling of the Beautiful and Sublime* and *Of the Different Races of Human Beings* is therefore not a philosophical tangent external to Kant's political theory; it is the empirical architecture that pre-determines who can and cannot meet the criteria through which the active Citizen is defined. Moral universality and political exclusion are not in tension within Kant's system; they are structurally coordinated through the same logic of empirically legible rational capacity.

The historical significance of this framework becomes fully visible when it is situated within the geocultural account that Wallerstein (2004a) traces of the French Revolution and the emergence of the Citizen as the central political figure of the modern world-system. The distinction between active and passive citizens finds its immediate institutional expression in Sieyès' formulation of October 1789, through which Wallerstein

(2003: 651-652) demonstrates how the liberal discourse of political capacity was crystallized into constitutional form. As Wallerstein documents, Sieyès concluded,

"All inhabitants of a country should enjoy in it the rights of passive citizens; all have the right to the protection of their person, of their property, of their liberty, etc. But all do not have the right to play an active role in the formation of public authorities; all are not active citizens. Women (at least at the present time), children, foreigners, and those others who contribute nothing to sustaining the public establishment should not be allowed to influence public life actively. Everyone is entitled to enjoy the advantages of society, but only those who contribute to the public establishment are true stockholders (actionnaires) of the great social enterprise. They alone are truly active citizens, true members of the association" (Sieyès cited in Wallerstein 2003: 651-652).

What Sieyès' formulation reveals is that the liberal discourse of political capacity developed across a century of European philosophy finds direct expression in the constitutional architecture of the modern state. The criterion of contribution to the public establishment, the possession of property, and the demonstration of rational self-sufficiency through productive labour are precisely the criteria of civil independence that Kant has articulated as the condition of active citizenship. The active citizen who pays three days' wages and owns property is the political form of the Kantian subject whose Reason is rendered legible through cultural production and material independence. Equally, the passive citizen, the domestic servant, the journeyman, the woman, the foreigner, is the political form of those whose lack of civil independence marks their exclusion from the legislative community of the republic.

As Wallerstein (2003: 652) further documents, this process had a determining consequence for the organisation of the racial order. The more equality was proclaimed as a moral principle, the more obstacles, juridical, political, economic, and cultural, were instituted to prevent its realization. Through this process, the concept of citizenship forced the crystallization of a long list of binary distinctions through which the cultural underpinnings of the capitalist world-economy were organized, culminating in what Wallerstein names the ur-category that all others imply: the civilized and the 'barbarian'. As Wallerstein (2003: 671) states directly,

"If race became a theorized concept in the nineteenth century, and racism an institutionalized practice, it was the result primarily of the centrality of the concept

of citizenship. For citizenship as a concept had two logical consequences. It led states to emphasize and to predicate and insist on homogeneity as the only sound basis on which to justify the theoretical equality of all citizens. And it led states to justify their political domination of other states on the grounds that their particular homogeneous quality incarnated a higher degree of civilization than that of the dominated state, equally homogeneous but inferior".

What Wallerstein identifies here is the historical consequence of the philosophical work traced across this chapter. The racialising effect of citizenship is not a distortion or betrayal of liberal universalism; it is its logical outcome. The requirement of homogeneity as the basis of theoretical equality reproduces, at the level of the state and the world-system, the same demarcation between those who possess the capacity for active membership and those who do not. This is precisely the demarcation that Hobbes, Locke, Rousseau, and Kant have been elaborating philosophically across the preceding sections. Race becomes theorized as a concept precisely because citizenship demands criteria of inclusion and exclusion, and those criteria have been organized through the racial logic of liberal political thought from the outset.

Taken together, Kant's active/passive citizen distinction, his racial hierarchy of moral and cultural capacity, and his insistence that Reason must become empirically legible through cultural production are not aberrations within liberal political thought. They are its most systematic philosophical expression. The criteria of rational independence, civic virtue, and cultural development that define the active Citizen are the philosophical form of the demarcation between the community of the free and those excluded from it. The Citizen is therefore not the failed universal of a liberalism that has not yet fulfilled its promises. Rather, the Citizen is the political figure through which the racial organisation of modern political life is formalized, naturalized, and reproduced within the geoculture of the world-system, and the liberal tradition that constituted it is not the innocent victim of historical contingency but the constitutive site of that production.

What the analysis of Kant has demonstrated is that the racial organisation of the modern world-system is not an anomalous deviation within the philosophical tradition of the Enlightenment but is inscribed within its most systematic and universally influential moral and political framework. The same figure who gave liberal political thought its most rigorous philosophical foundation simultaneously provided what Charles W. Mills (1997: 71) identifies as the foundational modern account of the division between persons and subpersons upon which the racial organisation of the political order depends. As Mills

states directly, and the formulation bears quoting in full because it names what the trajectory traced across Chapters 8 and 9 has been approaching:

"Kant demarcates and theorizes a color-coded racial hierarchy of Europeans, Asians, Africans, and Native Americans, differentiated by their degree of innate talent. 'Talent' is that which, by 'nature,' guarantees for the 'white' in Kant's racial rational and moral order, the highest position above all creatures, followed by the 'yellow,' the 'black,' and then the 'red.' Skin color for Kant is evidence of superior, inferior, or no 'gift' of 'talent,' or the capacity to realize Reason and rational-moral perfectibility through education [...] full personhood for Kant is actually dependent upon race. In Eze's summary, 'The black person, for example, can accordingly be denied full humanity since full and 'true' humanity accrues only to the white European.' [...] the embarrassing fact for the white West (which doubtless explains its concealment) is that their most important moral theorist of the past three hundred years is also the foundational theorist in the modern period of the division between *Herrenvolk* and *Untermenschen*, persons and subpersons, upon which Nazi theory would later draw. Modern moral theory and modern racial theory have the same father" (Mills 1997: 70-71).

The claim that modern moral theory and modern racial theory have the same father is not a polemical flourish. It is the most precise available formulation of what the analysis developed across Chapters 8 and 9 has demonstrated. The invention of Man that Chapter 8 traced through the humanist epistemic tradition established the conditions under which a racially specific perspective could be universalized and its particular standpoint rendered invisible as the view from nowhere. The liberal political discourse that Chapter 9 has traced through Hobbes, Locke, Rousseau, and Kant translated those epistemic conditions into the political criteria of rationality, moral capacity, and civic virtue through which the Citizen was constituted. Race is not lost within liberal political discourse; it is reproduced through it. The partitioned social ontology of persons and racial subpersons, sustained through the same philosophical tradition that gave liberal political thought its universalist self-presentation, is the foundational political achievement of a tradition that has always been, from its inception, racially constituted at its core. What the analysis of Chapters 8 and 9 has established, taken together, is that the Janus-faced nature of liberal democracy is not a contingent failure of universalist ideals but is constitutive of the very epistemic and political categories through which those ideals were articulated. It is this conclusion that the following section draws together through Balibar's concept of equaliberty, examining

how the contradiction at the heart of modern citizenship both confirms and extends what the preceding analysis has demonstrated.

#### 9.4. Balibar, Equaliberty, and the Contradiction at the Heart of the Citizen

The analysis traced across Chapter 9 thus far have established that the figure of the Citizen does not emerge from a philosophically neutral tradition of rights and freedoms subsequently distorted by colonial practice. It is constituted through a philosophical tradition in which the criteria of political belonging were organized through racial hierarchy from the outset. What remains to be drawn together is the structural logic through which this constitution operates, and it is here that the work of Étienne Balibar becomes analytically indispensable. Working with and against Wallerstein, and recognizing the fundamentality of the Cartesian Subject and the humanist tradition to modern citizenship, Balibar extends the analysis by turning to the philosophical principles of humanism and liberalism that underwrite the very contradictions the preceding sections have traced. While Wallerstein recognizes the stabilizing yet constraining force citizenship becomes for centrist liberalism and the capitalist world-economy, Balibar pushes further by identifying the contradiction as constitutive rather than contingent. Bringing two essential points of Balibar (2015; 2016) together, Geoff Pfeifer (2020: 335-336) summarises:

"Modernity promoted or invented a notion of the citizen that implies not only that an individual belongs to a community (the nation) but also that he has access to a system of rights from which no human being can be legitimately excluded...on the other hand, modernity enlarges as never before the project of classifying human beings precisely in terms of their differences, and more importantly, transforms it. Using it to designate... primarily possibilities of human actualization among which individuals must 'choose' and that each time represent differentials of power, value, and ability... [this process] opens not just a gap, but an abyss. The principle that establishes the intensive, or qualitative, universality of the Demos also involves a seemingly insurmountable qualitative exclusion...Far from relieving this tension, modern universalism's transformation of equal liberty of citizens into the rights of man and citizen within the national framework has in fact aggravated it. This tension did not prevent the emergence of social movements and struggles that led entire categories that had previously been excluded, such as women and labourers, becoming or re-becoming citizens; what it did entail, however, was that those who have been excluded from citizenship (and there are always new categories that are) are represented, so to speak, produced, by all sorts of disciplinary or institutional

mechanisms, as imperfect human beings, as abnormals, or monsters at the margins of humanity" (Pfeifer 2020: 335-336).

What both Balibar and Pfeifer recognize is that there is a fundamental contradiction at the heart of modern citizenship. The universality through which the Citizen is imagined depends upon a continually expanding set of classifications that differentiate between those who are constructed as embodying the Enlightenment ideals of the Citizen and those who are constructed as incapable, deficient, or not yet fully human. In this sense, the pursuit of inclusion becomes inseparable from the production of new forms of exclusion. Such an insight not only aligns with Wallerstein's reflection that the cultural-ideological coherence of the world-system rests upon categories whose universality was always more rhetorical than actual, but it also reveals how the early humanist and liberal discourses underpinning these categories played a foundational role in the construction of the boundaries of political belonging throughout modern citizenship.

Balibar's analysis makes this point clear. As he notes, modern citizenship is structured by a tension in which the claim to universality is inseparable from practices that continually differentiate and classify. This antinomy is what Balibar conceptualizes as equaliberty, a principle in which equality and liberty are declared universal yet instantiated through forms of belonging that reintroduce hierarchy and exclusion (Balibar 2015). The universality of the Citizen rests upon the co-production of equality and inequality within the very logic of political subjectivity. The humanist and liberal appeals to universality provide the very categories in which inclusion is entangled with exclusion. As such, the exclusions that structure modern citizenship cannot be treated as deviations from its principles but as expressions of the epistemic assumptions that enabled those principles to function.

What becomes evident when Balibar's reflections are situated within the broader argument developed throughout this chapter is that the antinomy structuring modern citizenship is not simply a tension internal to liberal political philosophy. Rather, it reflects a deeper division that shaped the modern world-system from its inception, one in which race is not an external imposition upon otherwise neutral categories of rights and belonging but a fundamental logic embedded within the very epistemic and political foundations through which those categories were articulated. The universalist promise of inclusion, finding its articulation through the discourse of rights and citizenship, was entangled from the outset with the racial hierarchies carried within the invention of Man and the Cartesian Subject, and it is through this entanglement that the Janus-faced character of liberalism identified at the outset of this chapter acquires its most precise political expression.

To conclude, the trajectory traced throughout Chapters 7, 8, and 9 brings into view a single, sustained argument about the relationship between race and the modern world-system, one that the analysis has pursued across three distinct but mutually constitutive dimensions. Chapter 7 established that race cannot be adequately understood as a derivative effect of capitalist accumulation, demonstrating instead that racial differentiation operates through religious, juridical, and epistemic domains that exceed the explanatory reach of economic approaches and that predate the consolidation of the capitalist world-economy. Chapter 8 pressed this argument into the epistemic foundations of modernity itself, demonstrating that race is not simply codified within the structures of knowledge but is constitutive of them, embedded within the humanist invention of Man and the Cartesian Subject through which the human, universality, and rational authority were defined. Chapter 9 has completed this arc by tracing how those epistemic foundations are carried into liberal political discourse, where race is neither simply inherited nor passively reproduced but actively elaborated through the very concepts through which liberal thought proclaimed its universalism. Liberal political discourse both draws upon racial hierarchy and deepens it. The criteria of order, capacity, virtue, and civic independence through which the Citizen was constituted were not neutral categories subsequently inflected by racial assumptions; they were articulated within and shaped by a world structured through racial hierarchy, and their elaboration across two centuries of liberal thought extended and refined that hierarchy in ways that rendered it politically operative and institutionally durable.

In Hobbes, race operates as the unspoken organising logic through which the boundary between political and pre-political life is drawn, such that the universal state of nature is exemplified through non-European populations cast as its literal inhabitants while European societies are represented as having already surpassed it (Hobbes 1651; Bauman 1990; Collins 1989). The Subject capable of political order is presupposed rather than theorized, already aligned with European modes of rationality, and the racial coding of disorder and incapacity is operative within the very terms through which that Subject is defined. Locke deepens this configuration by rendering political standing conditional upon rational self-command, labour, and improvement, and it is through these criteria that race is inscribed into the very structure of political capacity (Locke 1690; Goldberg 1993; Mills 1997). The asymmetry between those who are represented as demonstrating the rational improvement the law of nature requires and those whose modes of life are positioned as failing to do so is not incidental to Locke's framework; it is constitutive of it, and it is this asymmetry that renders the territories of non-European populations normatively open for seizure within the philosophical framework that simultaneously proclaims natural equality.

Rousseau intensifies rather than resolves this structure by relocating the criterion of political inclusion to moral development and educability, conditioning the realization of equality upon cultural trajectories that are organized through European norms of civic virtue and discipline, such that race continues to operate as the invisible architecture through which the uneven distribution of political capacity is sustained and reproduced (Rousseau 1997; Cook 1936; Mills 2022). Kant completes the trajectory by rendering the racial hierarchy of his early writings empirically legible through culture, anchoring the evaluation of rational capacity in observable cultural production in ways that translate his systematic racial theorization directly into the architecture of active and passive citizenship (Kant 1785; 1797; Vial 2016; Rotenstreich 1989). Across these traditions, liberal political discourse does not merely reflect racial hierarchy; it elaborates, deepens, and institutionalizes it through the very concepts through which it proclaims universality.

When read together across Chapters 7, 8, and 9, these dimensions bring into view a continuity rather than a rupture between the historical, epistemic, and political organisation of race within the modern world-system. As developed across Chapters 4 and 5, Wallerstein's account of centrist liberalism shows how the geoculture of the modern world-system simultaneously proclaimed the modernity of liberation and institutionalized the modernity of technology. Liberalism managed this contradiction by appealing to rationality, education, and civic virtue as the conditions of genuine political membership while deferring their universal realization indefinitely. What Wallerstein describes from the structural side as the taming of the dangerous classes and the management of the modernity of liberation's promises is, from the philosophical side traced across Chapters 8 and 9, the institutionalization of racially organized criteria that had been elaborated and deepened over the preceding two centuries through the very concepts of the Cartesian Subject following the invention of Man, and the liberal tradition from Hobbes through Kant. This does not undermine Wallerstein's account; it gives it a philosophical depth that the structural analysis alone cannot provide. The geoculture does not arrive with the French Revolution from nowhere. It arrives as the political and institutional form of a philosophical framework that was already in place, whose racial logic had been constituted across the preceding centuries, and which liberal political discourse had itself actively shaped.

This is the deeper answer to the question that Chapter 6 raised but left open. Chapter 6 identified the moment at which the geoculture began to unravel: the 1968 rupture that exposed the racial and colonial foundations of liberal universalism. What it could not fully account for was why those foundations were so entrenched. Chapters 7, 8, and 9 have provided that account. The categories that the movements of 1968 contested,

the rational Citizen, the active member of the political community, the subject whose Reason and virtue qualified them for self-governance, were not simply ideological constructions of the geoculture. They were the philosophical and epistemic form of racial exclusions that had been articulated across the *longue durée* of European history, embedded within the structures of knowledge, and elaborated through two centuries of liberal political thought in which race operated not as an explicit taxonomy but as the foundational logic through which the criteria of political belonging were established, maintained, and reproduced. To contest the Citizen in 1968 was, whether recognized as such or not, to contest the entire philosophical and epistemic framework through which the modern world-system had organized racial hierarchy as political belonging. Universality is grounded at the level of the Subject, while racial differentiation articulates through the uneven recognition of capacity, a dynamic that Goldberg identifies as central to the liberal paradox in which race is declared morally irrelevant even as racialising distinctions proliferate in practice (Goldberg 1993). Mills further clarifies that this tension reflects not a simple failure of liberal ideals, but the historically specific manner in which those ideals are realized and sustained within a racially structured world (Mills 1997; 2022). Race thus functions not as an external distortion of liberalism, but as a foundational condition of its political operation.

In this sense, Balibar's reflections on equaliberty and the contradictory logic of modern citizenship help to clarify the depth of tensions that Wallerstein identifies through the centrist liberal geoculture and the structures of knowledge. What had been a stabilizing force for the centrist liberal geoculture, the conception of the Citizen, increasingly could no longer conceal the exclusionary practices that continued to reproduce classifications of difference. The antinomy of equaliberty does not simply illuminate a philosophical ambiguity within modern citizenship but exposes the racial, gendered, and colonial assumptions that underwrote the functioning of the world-system. The liberal Citizen, viewed through this trajectory, does not displace the Cartesian Subject but builds upon it, translating epistemic hierarchies into political differentiation through criteria of rationality, moral capacity, and civic independence that are historically produced and unevenly distributed. The Citizen is therefore not the failed universal of a liberalism that has not yet fulfilled its promises, but the political form of a community of the free whose criteria of membership have always been racially organized. What the philosophical work of Chapters 7, 8, and 9 has established is that race is not a secondary effect of the modern world-system but a foundational logic articulated across its historical, epistemic, and political dimensions simultaneously. The final question that remains is how this logic is

organised, stabilised, and rendered durable within the material world, and it is to this question that Chapter 10 now turns.

## Chapter 10. Race, Space, and the Material Organisation of the Modern World-System

The preceding chapters have shown that race cannot be adequately understood as a secondary ideological effect of capitalist development, nor as a residual cultural logic that merely stabilizes economic relations within the modern world-system. By tracing the temporal and conceptual foreclosure that W-SA imposes on race, Part II has shown that race operates as a foundational logic articulated across religious, juridical, epistemic, and political dimensions that are not reducible to the economic pillar alone. Across these dimensions, race has emerged as a durable and constitutive logic through which hierarchy is organised, difference is rendered actionable, and the boundaries of belonging are drawn and redrawn across the *longue durée* of the modern world-system.

Chapters 8 and 9 established that race's reach is not confined to any singular pillar but operates across the structures of knowledge and liberal political discourse. The epistemic epicentre of Western structures of knowledge, the Cartesian Subject, emerges not in philosophical isolation but within a world already being structured by conquest, colonialism, and evolving racial hierarchies (Grosfoguel 2002; Wynter 2003; Quijano 2007). The epistemic shift toward Nature and Reason as the foundations of universal knowledge carries the promise of emancipation from theological hegemony, yet simultaneously provides the conditions through which existing racial hierarchies are rearticulated within the emerging structures of knowledge that come to underpin the geoculture of the modern world-system. As such, the Subject produced through this shift does not arrive in a racially neutral world but is articulated within and through it, establishing the conceptual terrain upon which the liberal Citizen is later constituted as the political embodiment of the modernity of liberation. Across Hobbes, Locke, Rousseau, and Kant, political capacity is progressively conditioned upon criteria of rationality, moral development, and civic virtue that are maintained as formally universal while remaining racially organised in their operation, such that the promise of inclusion and the mechanism of exclusion are co-constituted (Goldberg 1993; Mills 1997; Balibar 1991; Wallerstein 2004a). Liberal political discourse, on this account, does not merely inherit a racially structured world but participates in its reproduction, translating the racial logics within the structures of knowledge into the political criteria through which belonging is organised, reorganised, and withheld.

Building on these foundations, Chapter 10 examines how the racial logics traced across Part II do not exhaust themselves within the structures of knowledge and liberal political discourse but extend into the material organisation of the world itself. The epistemic and

political discourses through which difference was rendered legible, hierarchised, and self-evident are not confined to conceptual or normative domains but remain entangled with the material relations in which they are lived and encountered (Wallerstein 1991; Lee 2003). The empirical turn within the structures of knowledge, which privileges observation, classification, and measurement, is central to this shift: difference is no longer confined to abstract theocentric epistemologies but is increasingly rendered visible and self-evident within the world itself. The distinctions produced and stabilised within the structures of knowledge and liberal political discourse do not remain at the level of normative or conceptual order but are reproduced in ways that can be apprehended, experienced, and acted upon. The central argument of this chapter is that space is racialised and race is spatialized as a relation of mutual constitution: the racial contradictions at the heart of liberalism established across Chapters 8 and 9 are not only epistemic and political but materially consequential, such that populations are formally included in the universalist claims of liberal political order and materially abandoned through its spatial organisation.

#### 10.1. Space, Race, and the Limits of World-Systems Analysis

Remaining predominantly within the macro-economic perspective, Wallerstein spatializes the world-system through the axial division of labour and the concepts of core, periphery, and semi-periphery (Wallerstein 2011). In doing so, there is a recognition of how the world-system is divided and categorized into regions based on their economic roles and relations of production. Uneven development therefore appears not as a contingent outcome of the system but as one of its defining features, with the differentiation of regions functioning as a stabilizing mechanism through which accumulation is organised and maintained over time. Within this framing, space is rendered legible primarily as a macro-economic geography produced through the global division of labour.

Within this spatial organisation, race is understood to emerge in close relation to the axial division of labour, functioning both as a product of economic differentiation and as a justificatory system for sustaining exploitative material relations (Wallerstein 1987; 1991). Populations are racialised according to their positioning within the world-economy and their concentration within particular geographic zones. Wallerstein thus recognizes that racial hierarchy is structurally embedded within the capitalist world-system rather than appended to it from outside, and that race functions as one of the means through which the unequal allocation of labour and reward is rendered intelligible and durable across time. The spatial organisation of the world-system and the racial organisation of labour are therefore closely intertwined at the level of global structure, yet this relationship remains

articulated primarily through the mapping of regions rather than through the internal organisation of social space.

While Wallerstein acknowledges spatial and racial differentiation on a global scale, his framework offers less sustained engagement with the internal spatial compartmentalization of colonized societies and with racialised spatial practices within core spaces themselves. Processes such as racial segregation, urban ghettoization, and the marginalization of racialised populations within core societies do not become central analytic objects within a framework oriented toward world-scale economic positioning. The geographic and spatial dimensions of race are treated primarily as external projects, understood as products of the expansion and function of the capitalist world-economy, such that space appears above all as a macro-structural map of inequality rather than as an everyday organising force.

This reflects the macro-economic logic that structures Wallerstein's analysis more broadly. Race and space are approached primarily as consequences of the axial division of labour rather than as processes with their own internal dynamics, and although the interconnectedness of the economic, political, and cultural domains is acknowledged, explanatory priority remains with the global organisation of production. As a result, internal racialisation processes, including those enacted through the organisation of housing, labour regulation, and territorial governance, remain analytically secondary. The world-system is recognised as spatially organised, yet spatial divisions are largely treated as relatively fixed outcomes of economic processes rather than as dynamically produced social arrangements, and uneven development is mapped while the lived organisation of space remains largely implicit.

This becomes particularly apparent in Wallerstein's treatment of colonial conquest and imperial expansion. Colonization spatially externalized non-European lands, integrating them into the world-system as peripheral territories while racialising their inhabitants, and the external periphery became necessary to the economic survival of the core through the provision of raw materials, labour, and markets. Within this account, racialisation appears primarily as a mechanism that stabilizes global inequalities by organising labour across differentiated zones, and the analytic emphasis remains on how global structures are produced and sustained rather than on how spatial differentiation is reproduced internally within core societies themselves. This is not an error of omission so much as a consequence of the level at which the framework is structured.

At this point, historical work that remains attentive to the *longue durée* of European development begins to place pressure on an exclusively external spatialization of racialisation. Robinson (1983) does not reject the core insights of W-SA, nor deny the

centrality of capitalism's global organisation, but brings into focus the ways in which any attempt to locate racialisation solely in colonial peripheries, or to treat it as emerging only after the consolidation of the axial division of labour, encounters significant historical difficulty. Robinson highlights the presence and exploitation of racialised labour within Europe prior to and alongside the expansion of the capitalist world-economy:

"[...] the vast majority of the barbarians 'came not as conquerors, but exactly as, in our own day, North Africans, Italians, Poles cross into Metropolitan France to look for work'. In a relatively short time, in southern-most European lands that were bounded by the Western Roman Empire, these peoples were entirely assimilated by the indigenous people as a primarily slave labour force [...] From the thirteenth century to the beginnings of the fifteenth century [...] in Spain (Catalan and Castile) and in the Italian colonies on Cyprus, Crete, and in Asia Minor (Phocaea) and Palestine, Genoese and Venetian masters used both European and African slaves in agriculture on sugar plantation, in industry, and for work in mines" (Robinson 1983: 11-16).

What is significant in Robinson's account is not the displacement of capitalism as an explanatory framework, but the historical complication it introduces for any attempt to spatialise racialisation only as an external colonial project. The movement and racialisation of populations operate prior to and alongside the expansion of the axial division of labour, which means that racial logic is not adequately confined to overseas peripheries nor reduced to an ideological effect of a fully consolidated capitalist axial division of labour. Racialised populations were emergent not only outside the core but also within the boundaries of developing European polities, introducing a tension internal to Wallerstein's mapping without negating it.

The question that begins to emerge is therefore not whether space matters, but how space matters. The external spatial logic of the world-system remains valuable for understanding global inequality, yet it does not fully account for how racial differentiation is organised, reproduced, and inhabited within the core itself. The world-system provides a map of inequality, but the historical record suggests that this map is not only projected outward but also lived inward. It is here, where macro-economic geography begins to intersect with the internal organisation of social space, that the question of scale becomes apparent, and where the analysis turns toward an understanding of how space itself participates in the constitution of racialised subjects.

It is here that Heng's (2011) analysis brings into focus something that falls outside the explanatory reach of a macro-economic spatial logic: how race is spatially constituted through cultural and epistemic practices that organise the world long before modern capitalism consolidates its global form. Heng highlights the ways in which European identity is produced through spatial representation, such that space is not merely mapped but actively imbued with racial meaning. As Heng observes, medieval cartography functions not simply as a record of geographic knowledge but as a cultural technology through which race is visualized, ordered, and stabilized within an imagined world:

"In the project of European identity, one of the most spectacular cultural creations of the medieval period - the *mappamundi*, or world-map - hit its stride in the 13th century and after as a medium that visually unfolds an imagined universe of space-time which pictures the world in extraordinary ways that reflect on, concretize, locations of race. A 13th century *mappamundi* such as the richly detailed Hereford map, with its more than 500 pictures, 420 towns, 15 Biblical events, 5 scenes from classical mythology, 33 plants and animals, and 32 peoples of the earth puts on display the 'cosmological, ethnographic, geographical, historical, theological and zoological state of the world' [...] by marking difference of place through the insertion of distinctive objects, narratives, and peoples that it locates into place as stakeholders for the meaning of the site" (Heng 2011: 338).

What is at stake in Heng's analysis is not representation alone, but the production of a spatial order in which difference is rendered visible, legible, and hierarchically arranged. Space is not neutral terrain awaiting economic inscription, but an already populated field in which meaning is assigned through the placement of peoples, objects, and narratives. The map does not simply depict the world; it organises it by locating difference in space and assigning that difference interpretive weight. Spatial representation functions here as a mechanism through which racial distinction is concretized and stabilized. This is developed further in Heng's discussion of how Europe is spatially differentiated from the rest of the world within medieval cartography:

"For the territories of Europe, place is visualized on the Hereford by architectural features such as fortifications and cathedrals - the built environment of civilized urban centres - and bordered by natural features such as rivers [...] Outside Europe, however, geography is often dissected as ethnography, with places being identified as the habitat of human groups made distinct by the attribution of traits to them that

are notable by virtue of their difference from normativity in the Latin West. Race is what the rest of the world has: made visible and projected on a map though a human landscape, it indexes each vector of the world according to its relative distance from Europe in a human landscape, as well as spatial terms. Rendered cartographically, the project of European identity, in surveying the world, sees Europe as the civilized territory of urban life - a web of cities - while global races swarm in other vectors of the world. In its most grotesque forms, cartographic race equates with the monstrous races of semi-humans located by the Hereford and other *mappamundi* in Asia and Africa, and especially the coastline of southern Africa, which in the Hereford arrestingly teems with human monsters of many kinds. The depiction of pygmies, giants, hermaphrodites, troglodytes, cynocephali, sciapods, and other part-human, part-animal, deformed and disabled peoples inherited from classical traditions harness the inheritance of the past to the medieval survey of anatomization of the world that reflects on the meaning and borders of European self-identity and civilization [...] Cartographic and imaginary race issued a grid through which European culture perceived and understood the global races" (Heng 2011: 339-341).

Here, space functions as a classificatory grid through which humanity itself is differentiated. Europe is rendered as built, bounded, and ordered, while the rest of the world is rendered as ethnographic space, populated by racialised others whose defining feature is their distance from European normativity. Race, in this formulation, is not merely attached to bodies but projected onto space itself, such that geography becomes a medium for organising human difference (Heng 2011: 339). The spatial distribution of populations is thus inseparable from the production of racial hierarchy, as distance from Europe is translated into degrees of civilization, normality, and belonging. Heng's analysis further brings into focus how this cartographic ordering does not merely mark difference but participates in its production through the inheritance and reworking of earlier traditions:

"For it would be true to say that race makes an appearance in the Middle Ages not only through fantasmatic blackness, Jews, Saracens, Mongols, Africans, Indians, Cathayans, tribal islanders, 'Gypsies', indigenes in the Americas, and the collections of hybrid and deformed humans pressing upon the edges of the civilized world, but it also to be found at the centre of things, in the creation of that strange creature who is nowhere, yet everywhere, in cultural discourse: the white Christian European in medieval time. Seven hundred years after the Hereford, Duchy of

Cornwall, and Psalter maps of the world had located monstrous races in southern Africa, there would indeed be a race of human monsters practicing monstrosity in the name of apartheid South Africa, and the colour of that monstrous race, as it turns out, was not black" (Heng 2011: 344).

What this passage points to is that spatialized race is not only projected outward but simultaneously articulates a normative subject at the centre of the imagined world. The White Christian European emerges not as an unmarked or natural universal but as a spatially constituted figure whose coherence depends upon the placement of racialised others elsewhere. This subject is nowhere and everywhere because it is produced through a spatial order that renders it normative without locating it as a marked category. Space operates here as a mediating structure through which normativity is secured, not by explicit declaration, but by the systematic differentiation of places and peoples. The centre does not need to be named as racial because race is made visible elsewhere, at the edges and margins of the mapped world (Heng 2011: 344). The spatial ordering of difference thus performs a dual function, simultaneously fixing racialised populations in place and producing a subject who appears to transcend place altogether.

In Heng's account, this spatial logic is not confined to representation but participates in the production of social reality. The cartographic ordering of the world does not simply reflect European self-understanding but actively organises it by binding identity, geography, and hierarchy together. Space becomes a medium through which the boundaries of civilization are drawn and redrawn, such that inclusion and exclusion are materially anchored in the organisation of territory, movement, and proximity. The repeated placement of racialised figures at the edges of the world reinforces the centrality of the European subject, while simultaneously rendering that subject invisible as a racial category. What emerges is not merely a map of difference but a spatial ordering through which subjects are differentiated, stabilized, and rendered governable.

Heng's analysis does not negate the significance of capitalism or the explanatory power of the world-system, but suggests that spatialized racial ordering was already operative before the axial division of labour consolidated its global form, and that the world-system's spatial organisation of inequality was articulated through a racialised field that predated it. Space is already structured as a racialised field before it is reorganised through the axial division of labour, and this prior organisation is among the conditions within which populations came to be positioned within capitalist hierarchies. This deepens rather than displaces the account of European universalism developed in Chapter 3. Wallerstein's account names the ideological function of universalism clearly, but treats it

primarily as a discursive justification that emerges with and alongside the capitalist world-economy (Wallerstein 2006: 1). What Heng's analysis of medieval cartography brings into focus is that the organisation of the world into a centre of civilization and edges of barbarism, with racialised bodies placed at the margins, predates both capitalism and the formal articulation of European universalism. The 'barbarian' was already being spatially produced and territorially located before the ideological apparatus that Wallerstein names was in place. This does not invalidate Wallerstein's account of how universalism functions within the world-system; it points to the ways in which the spatial conditions for that function were already being organised through representational and cartographic practices whose racial logic was active long before capitalism consolidated its global form. The world-system can map inequality across regions, but it presupposes spatial distinctions that are already saturated with meaning, hierarchy, and normativity. Economic differentiation thus operates upon a spatial field that is never neutral, but already organised through regimes of difference.

The question of how space matters therefore shifts at this juncture. The material organisation of the world is not adequately understood only as the macro-structure through which labour and capital are distributed, nor as a representational surface upon which difference is projected. Instead, space emerges as one of the primary means through which racialised subjects are constituted, normalised, and positioned, such that the organisation of territory participates in the production of subjectivity, shaping who appears as fully human, who appears as marginal, and who appears as monstrous or disposable. It is this capacity of the material organisation of space to constitute subjects, rather than merely to locate them, that the following section turns to by tracing how the spatial constitution of race operates not only within the representational and epistemic registers that Heng illuminates, but as a lived, enforced, and materially consequential reality.

## 10.2. Race and the Material Organisation of Space

The preceding section has established that space and racial hierarchy are mutually constitutive across the *longue durée* of the modern world-system, and that the spatial logics through which racial differentiation is articulated, enforced, and experienced exceed the explanatory reach of Wallerstein's macro-economic spatial account. What the arc traced across that section brings into focus, and what has not yet been named directly, is that the spatial arrangements examined are not only mechanisms of racial classification or political exclusion but mechanisms through which the differential conditions under which racialised populations inhabit the world are materially organised. The dimension of the spatial argument that calls for the closest attention is not simply that racial hierarchy organises the

material world, but that the material organisation of territory shapes the conditions under which racialised populations exist, move, and are governed as a feature of ordinary life. This is what falls outside Wallerstein's macro-economic account. The spatial logic of core, semi-periphery, and periphery maps where racialised populations are positioned within the world-economy, but it does not account for how the organisation of territory shapes who lives under what conditions, or how the racially organised arrangement of the material world is such that the differential conditions of racialised populations appear as an ordinary and self-reproducing feature of the world-system.

Frantz Fanon's (1963) reflections on the colonial city bring into view how racial hierarchy is lived and enforced through the organisation of territory itself. Fanon does not treat the built environment as a neutral setting for domination, but as a material condition through which colonial logic becomes embedded in everyday life and through which racial identities are continuously produced. The colonial world he describes is not only divided but actively compartmentalized, such that spatial separation structures proximity, deprivation, and exposure. These material arrangements are not incidental to colonial power but are among the primary means through which domination is rendered ordinary and durable. Territory, in this account, becomes inseparable from racial classification, as its organisation shapes how bodies move, where they may reside, and what forms of life are made possible:

"The town belonging to the colonized people, or at least the native town, the Negro village, the medina, the reservation, is a place of ill fame, peopled by men of evil repute. They are born there, it matters little where or how; they die there, it matters not where, nor how. It is a world without spaciousness; men live there on top of each other, and their huts are built one on top of the other. The native town is a hungry town, starved of bread, of meat, of shoes, of coal, of light. The native town is a crouching village, a town on its knees [...] The world divided into compartments, this world cut in two is inhabited by two different species [...] When you examine at close quarters the colonial context, it is evident that what parcels out the world is to begin with the fact of belonging to or not belonging to a given race, a given species [...] The cause is the consequence; you are rich because you are white, you are white because you are rich" (Fanon 1963: 39-40).

What Fanon's account brings into focus is that the material division of territory is not a secondary manifestation of racial hierarchy but one of its primary conditions of possibility. The colonial city is organised as a world without spaciousness, not simply in a

physical sense but as a social condition in which deprivation, proximity, and exposure are structured through the arrangement of territory itself. The partitioning of territory into distinct sectors yields not only unequal access to resources but unequal relations to the conditions of ordinary life, such that hunger, crowding, and scarcity become normalised for the colonised. The compartmentalization Fanon describes is therefore not merely descriptive of inequality but constitutive of racialised subjectivity, as the lived experience of the material world shapes what kind of being the colonised subject is permitted to be. Race, in this sense, is not simply read onto territory but lived through it (Fanon 1963). Equally significant is the circularity Fanon identifies between race and material condition, encapsulated in the formulation that the cause is the consequence. The division of the world into compartments is justified through racial classification, yet that classification is simultaneously sustained and reinforced by the material organisation of wealth and deprivation, such that the arrangement of territory stabilizes racial hierarchy by rendering it self-evident through everyday experience.

Fanon's analysis does not treat the colonial city as an isolated arrangement. The material logics he describes are not confined to the colony alone, nor do they emerge independently of the political and moral orders of Europe. The compartmentalized world of the colony is constituted through techniques of domination, surveillance, and exclusion that are developed within imperial projects and justified through claims of civilization and progress. These techniques are not spatially or politically quarantined. It is at this point that Aimé Césaire's (1950) formulation of the imperial boomerang points to the return of colonial logics to the core nations themselves, showing colonial territory as a site of experimentation whose techniques circulate back into the metropole:

"And then one fine day the bourgeoisie is awakened by a terrific boomerang effect: the gestapos are busy, the prisons fill up, the torturers standing around the racks invent, refine, discuss. People are surprised, they become indignant. They say: 'How strange! But never mind - it's Nazism, it will pass!' And they wait, and they hope; and they hide the truth from themselves, that it is barbarism, the supreme barbarism, the crowning barbarism that sums up all the daily barbarisms; that it is Nazism, yes, but that before they were its victims, they were its accomplices; that they tolerated that Nazism before it was inflicted on them, that they absolved it, shut their eyes to it, legitimized it, because, until then, it had been applied only to non-European peoples; that they have cultivated that Nazism, that they are responsible for it, and that before engulfing the whole edifice of Western, Christian

civilization in its reddened waters, it oozes, seeps, and trickles from every crack" (Césaire 1950: 7).

Césaire points here not merely to a moral indictment of European hypocrisy but to a structural account of how colonial violence is normalised through the material organisation of territory before it is recognised as violence at all. The barbarism that shocks Europe when it appears in fascist form is the condensation of practices long exercised in territories marked as external, peripheral, and disposable. Colonial territory functions as a site in which techniques of domination are refined and legitimized because they are applied to populations placed outside the bounds of European moral concern. The boomerang names the moment when these techniques are no longer containable within colonial geography, when the distinction between there and here collapses. Foucault reformulates this logic by tracing how colonial techniques of power are reabsorbed into European political and institutional life. As Foucault (1976) writes,

"[...] colonization, with its techniques and its political and juridical weapons, obviously transported European models to other continents, it also had a considerable boomerang effect on the mechanisms of power in the West, and on the apparatuses, institutions, and techniques of power. A whole series of colonial models was brought back to the West, and the result was that the West could practice something resembling colonization, or an internal colonialism, on itself" (Foucault 1976: 103).

The partitioning, surveillance, and containment developed in the colonial city do not remain external to Europe but reappear within the core as modes of internal governance. The material organisation developed to manage colonial populations becomes a template for managing difference within the metropole itself, and the boundary between colony and metropole thus begins to collapse as logics of domination circulate rather than remain fixed in place. What Fanon points to at the level of lived colonial territory, and what Césaire names at the level of imperial structure, Foucault traces as a transformation in the material organisation of power within Europe itself.

That these logics operate within the liberal democratic core is not a discovery that awaits the contemporary moment. W. E. B. Du Bois's (1899) study of Black life in Philadelphia documented with systematic empirical care how racial hierarchy is reproduced through the material organisation of urban life within a liberal democratic society that formally proclaimed the equal civic standing of all its inhabitants. Residential

concentration, the distribution of employment and educational opportunity, the differential allocation of civic resources across the city's zones, and the confinement of racialised populations to specific districts through informal but structurally effective mechanisms were not violations of liberal democratic order but features of its ordinary material organisation. Race structured the geography of the city not through overt legal exclusion but through the accumulated effect of arrangements whose racial character was simultaneously operative and formally denied (Du Bois 1899). The racial organisation of territory that the colonial city rendered visible in its most explicit and enforced form was already present within the liberal democratic core, operating through the quieter mechanisms of confinement, differential access, and the uneven distribution of resources that formal universalism could neither see nor acknowledge.

What Du Bois documented as the ordinary material organisation of Philadelphia finds its theoretical elaboration in AbdouMalik Simone's (2017) analysis of what he terms the black city. Simone highlights the ways in which various instantiations of urban modernity have relied upon designating particular kinds of residents and ways of making urban life as 'black', such that attributions of blackness to specific urban territories function to devalue their residents and establish those territories as incomplete in terms of the emerging norms and values of the modern city. The consequences of this attribution for the populations who inhabit these territories are politically consequential:

"The black resident or black district exists as a residual body; a body as anachronism in 'real' processes of urbanization where urban 'users' are not coherent entities but shifting fields of probable actions, data sets, risk calculations, credit ratings, genetic profiles, and shifting lifestyles. Now, populations are less defined by stable, differentiated attributes through which relative inequities can be measured than by the nature of their convertibility and interoperability. This is the capacity of a population to compose and decompose, to become different things at different times" (Simone, 2017).

The residual body is not a body that has been expelled from the liberal democratic city but one that is required to remain within it on terms that deny it full civic standing. As Simone further notes, the black resident is required to absorb the failures and inadequacies of the urban system while being rendered invisible as a civic subject, inhabiting a territory simultaneously marked as the proper place for racialised populations and as peripheral to the processes through which the city produces and reproduces itself. This is the spatial enactment of what the analysis of Chapter 9 established at the political and philosophical

level: the criteria of rationality, civic virtue, and capacity for self-governance through which the liberal Citizen is constituted are inseparable from the racially organised designation of those who cannot meet them as residual, as the necessary outside of a political order whose universalist claims depend upon the material organisation of their abandonment.

What the accounts assembled across this chapter bring into focus, taken together, is that the relationship between race and the material organisation of territory is not sequential or derivative but mutually constitutive in the sense that Fanon names when he writes that the cause is the consequence. This mutual constitution is not incidental to the argument developed in Chapters 8 and 9 but is its material enactment. As the analysis of Chapter 9 established, a significant move in the Kantian framework is the insistence that rational capacity must become empirically legible through culture, that moral and political hierarchy must be observable and evidenced in the material world rather than merely asserted at the level of philosophical abstraction. The material organisation of territory into zones of relative security and zones of deprivation is not a neutral consequence of economic positioning but is articulated through racial hierarchy, such that the differential conditions under which racialised populations inhabit the world are reproduced through arrangements through which racial difference is rendered self-evident.

Correspondingly, race is spatialized: the racial classifications through which populations are rendered differentially situated within political life are not operative in abstraction from material conditions but are inscribed within and reproduced through those arrangements as a feature of ordinary existence. Each dimension conditions and is conditioned by the other. The *mappamundi* does not merely reflect a racial order already constituted elsewhere; the White Christian European subject is rendered normative through its positioning at the centre of the known world, just as racialised populations are rendered marginal through their placement at its edges. Fanon's colonial city does not merely express a racial hierarchy; racial subjectivity is inscribed through the lived organisation of deprivation, confinement, and differential exposure, such that the material arrangement is inseparable from the racial constitution it sustains. What Du Bois documents within the liberal democratic city points to this circularity at the level of the core: the racial organisation of Philadelphia's geography is sustained through the apparent incapacity of its racialised populations for full civic standing, while that material organisation simultaneously articulates the conditions that make the appearance of incapacity self-evident and self-confirming. The cause is the consequence, not only in the colonial city Fanon describes but within the liberal democratic order that proclaims itself to be civilized.

It is Simone who brings into focus the contemporary form of this circularity. The black resident exists as a residual body within the liberal democratic city, required to absorb the failures and inadequacies of the urban system while being rendered invisible as a civic subject, inhabiting a territory simultaneously marked as the proper place for racialised populations and as peripheral to the processes through which the city produces and reproduces itself (Simone, 2017). This residual positioning is not incidental to liberal democratic order but constitutive of it: the criteria of rationality, civic virtue, and capacity for self-governance through which the liberal Citizen is constituted are inseparable from the racially organised designation of those who cannot meet them as residual, as the necessary outside of a political order whose universalist claims depend upon the material organisation of their abandonment. The arrangements this chapter has traced are not the visible symptoms of a hidden racial logic. They are its material enactment.

### Part III. Theoretical Integration: Constructing a Race-Critical World-System

Part III moves from the race-critical elaboration of Part II to a theoretically integrative engagement with W-SA by incorporating three theoretical resources into the framework to begin constructing a race-critical world-system. The purpose of Part III is not to extend the critique of W-SA but to draw on the structural and conceptual foundations established in Part I and the race-critical elaboration of Part II to assemble a framework adequate to establishing race and racism as foundational logics of the MW-S across its economic, political, and cultural pillars simultaneously. This is accomplished through the integration of heterarchy, the colonality of power, and the Racial Contract, each of which contributes a distinct analytical register to the integrated framework.

Chapter 11 integrates heterarchy and the colonality of power into W-SA in order to establish race and racism as theoretically central to the world-system rather than derivative of its economic architecture. Developed by Grosfoguel (2002; 2006) and elaborated through Castro-Gómez (2023), heterarchy reconceptualises power within W-SA in a manner directly continuous with the logic of articulation, demonstrating that the economic, political, and cultural pillars of the MW-S operate in co-constitutive relation without any single one exercising necessary primacy, such that race functions as a foundational logic entangled across all three pillars simultaneously. The colonality of power, as theorised by Quijano (2000) and extended by Grosfoguel (2002; 2004; 2016), provides the global-historical conditions through which racial hierarchy persists as a structural feature of the present beyond the formal dissolution of colonial administrations, establishing that the Janus-faced nature of liberal democracy is reproduced through the institutional, epistemic, political, and material organisation of the world-system under the myth of decolonisation.

Chapter 12 integrates the Racial Contract, as theorised by Mills (1997), into W-SA in order to specify the political and epistemological mechanisms through which racial hierarchy is encoded within and obscured by the universalist categories of liberal political order. The chapter demonstrates that political subjecthood and epistemological authority are structured through racial differentiation while remaining formally universal, tracing how the Racial Contract's partitioned social ontology and epistemological ignorance reproduce the racial organisation of liberal order within its own normative terms. The chapter further extends this analysis into the material organisation of space, through which these hierarchies are rendered empirically visible, socially operative, and durable across the lifespan of the MW-S.

## Chapter 11. Coloniality, Heterarchy, and the Reconceptualisation of Power in World-Systems Analysis.

Chapter 11 addresses the temporal and conceptual foreclosure identified in Chapter 7 by integrating two interrelated frameworks whose combined analytical purchase allows race to be theorised as a foundational logic of the world-system without collapsing that analysis into economic determination. Heterarchy, as developed by Grosfoguel (2002; 2006) and elaborated through Castro-Gómez (2023), reconceptualises power within W-SA in a manner directly continuous with the logic of articulation, holding that the economic, political, and cultural pillars operate in co-constitutive relation without any single one exercising necessary primacy, such that race emerges as a foundational logic entangled across all three pillars simultaneously. The coloniality of power, as theorised by Quijano (2000) and extended by Grosfoguel (2002; 2004; 2016), provides the global-historical conditions through which racial hierarchy persists as a structural feature of the present beyond the formal dissolution of colonial administrations, demonstrating that coloniality is not a residue of a formally ended past but an ongoing condition of the MW-S reproduced under the myth of decolonisation. Heterarchy is developed first because it supplies the conception of power through which the coloniality of power can be integrated into W-SA without reproducing the economic reductionism that Chapter 7 identified as the structural limitation of the tradition.

### 11.1. Heterarchy: Power, Articulation, and the Reconceptualisation of the World-System

Wallerstein's macro-structural focus, while indispensable for tracing core-periphery relations and the *longue durée* of capitalist development, has a tendency to treat race as a *post hoc* justification of capitalist exploitation rather than as a foundational logic with its own historical momentum. This tendency is not incidental but structural: it follows from a theoretical framework in which the economic pillar exercises determining force over the political and cultural, such that race can only appear within the framework as an ideological supplement to accumulation rather than as a co-constitutive logic operative across all three pillars simultaneously. The historical scholarship examined in Chapter 7 demonstrates why this is inadequate. Heng (2011; 2018; 2021) establish that religiously inflected racial logics were already circulating before the emergence of capitalism in the long sixteenth century. Rather than arising strictly in response to capitalist imperatives, race and its attendant hierarchies were present before and rearticulated during the expansion of historical capitalism. A framework that treats race as derivative of economic positioning cannot account for this temporal depth, and in such a temporal and conceptual foreclosure, it also inhibits the capacity to theorise race as a foundational logic embedded

within the structures of knowledge, the political criteria of civic membership, and the material organisation of space that Part II established as co-constitutive dimensions of racial formation within the world-system. As Wallerstein himself acknowledges, this limitation is structural, following from the most enduring inheritance of nineteenth-century social science:

“World-systems analysis intends to be a critique of nineteenth-century social science. But it is an incomplete, unfinished critique. It still has not been able to find a way to surmount the most enduring (and misleading) legacy of nineteenth-century social science - the division of social analysis into three arenas, three logics, three ‘levels’ - the economic, the political and the socio-cultural. This trinity stands in the middle of the road, in granite, blocking our intellectual advance [...] [A]ll of us fall back on using the language of the three arenas in almost everything we write [...] We are pursuing false models and undermining our own argumentation by continuing to use such language. It is urgent that we begin to elaborate alternative theoretical models.” (Wallerstein cited in Grosfoguel 2002: 215-216)

Grosfoguel (2002: 215) identifies the culture versus economy debate that divides postcolonial critique from W-SA as a chicken-egg dilemma that follows directly from this inherited architecture. Postcolonial critiques characterise capitalism as a cultural system in which culture is the constitutive element determining economic and political relations, while world-systems scholars treat economic relations at a world-scale as constitutive of the system, with cultural and political relations as instrumental or epiphenomenal. Both positions, Grosfoguel argues, reproduce the division they claim to contest. What is needed, and what Wallerstein’s own self-critique calls for, is a new conceptual language that can move beyond this division between the pillars without either collapsing the economic into the cultural or reducing the cultural to the economic. Heterarchy, drawing on Kontopoulos (1993), is that language. As Grosfoguel (2002: 217) states, “heterarchical thinking is an attempt to conceptualize social structures with a new language that breaks with the liberal paradigm of nineteenth-century social science”. Crucially, heterarchy is not introduced as a rejection of Wallerstein but as the necessary refinement that allows W-SA to register the full depth of race as a foundational logic of the MW-S, a refinement that moves in the direction Wallerstein’s own self-critique calls for.

Castro-Gómez (2023: 453-454) further contends that hierarchical theories of power hold that all institutions are ultimately governed by a single overarching macro-logic, which is why racial hierarchy can only ever appear within W-SA as an ideological

supplement to the capitalist world-economy. Instead, heterarchical theories of power hold that social formations consist of partially interconnected assemblages, each operating through its own historically constituted dynamics, without any single one exercising necessary primacy. The economic, the epistemic, the political, and the material are not autonomous pillars operating according to their own independent logics, which would reproduce the very division Wallerstein identifies as the problem, but neither are they reducible to one another or to a single master determination. As Grosfoguel (2006: 172) establishes, the heterarchical constitution of the MW-S is an entanglement of multiple heterogeneous hierarchies of:

“[...] sexual, political, epistemic, economic, spiritual, linguistic, and racial forms of domination and exploitation where the racial/ethnic hierarchy of the European/non-European divide transversally reconfigures all other global power relations”.

The phrase ‘transversally reconfigures’ states the analytical claim precisely. Race does not determine all other hierarchies, which would impose a form of racial reductionism like that of the economic. Rather, the racial and ethnic hierarchy of the White/non-White divide operates across and through all other hierarchies simultaneously, reorganising their operation in ways irreducible to any single one of them in isolation. The economic hierarchy of core and periphery is racially reconfigured: who is assigned to which position within the axial division of labour is not determined by economic logic alone but through the racial classification in which humanity, capacity, and productivity are distributed within the world-system. The epistemic hierarchy of Western and non-Western knowledge is racially constituted: the elevation of European knowledge to universal status has its own depth in the structures of knowledge through which the Cartesian Subject was consolidated as the epistemic epicentre of the world-system, prior to and as a condition of possibility for capitalist consolidation, not as its consequence. The political hierarchy of full and partial citizenship is racially organised: who is extended the full protections of the liberal political community reflects a racial logic philosophically elaborated, as Chapter 9 demonstrated, before it was institutionally consolidated. The spatial hierarchy of protected and abandoned territory is racially enacted: the mutual constitution of race and space established in Chapter 10 operates through logics that precede and exceed the macro-economic spatial logic of the axial division of labour. Across each dimension, race functions not as an effect of a more fundamental economic logic but as a constitutive formation through which the world-system’s multiple hierarchies are simultaneously organised, reinforced, and rendered self-evident.

Heterarchical thinking also resolves the tension that Hall (1980; 2021) identifies between economic determinism and cultural relativism. In the heterarchical conception of power, culture is not a dependent superstructure but a constitutive and generative dimension that both shapes and is shaped by the economic. This enables the conjunctural analyses through which racial ideologies, state power, and economic transformations can be understood as converging in specific historical moments rather than as the expression of a single underlying logic. Contemporary far-right populisms illustrate the point: economic downturns may intensify discontent, but xenophobic and racist discourses draw on historical formations with their own depth and momentum, operating through and across the economic, epistemic, and political dimensions simultaneously rather than as ideological responses to material conditions (Finchelstein 2019; Bonilla-Silva 2000).

Crucially, heterarchical thinking does not abandon Wallerstein's macro-structural insights. It refines them by situating capitalism alongside race, religion, and other axes of power, each with their own histories and crises. If we cling to a framework in which the economic base steers all other social dimensions, we risk glossing over the endurance of racial formations and the complexity of current political realignments. Conversely, abandoning the structural dynamics of W-SA reduces culture and ideology to a realm of symbolic play detached from material conditions. Heterarchy counters both extremes, illuminating how different hierarchies continually intersect, reinforce, and destabilise one another across the *longue durée* of the MW-S.

The relationship between heterarchy and the logic of articulation is constitutive rather than coincidental. Articulation holds that the instances constructing racial and social formations stand in no relation of necessary correspondence or expressive homology to one another, but are historically joined into complex unities structured in dominance that remain open to rearticulation and disarticulation under changing historical conditions (Althusser 2001; Hall 1980). This is precisely what heterarchy implies at the conceptual level of power: the different hierarchies constituting the MW-S are not harmonically integrated through a single overarching logic but are historically articulated into a complex unity through contingent, contested, and potentially reversible processes. The stability of racial formation across the *longue durée* is therefore not the product of a single determining logic reproducing itself automatically, but the outcome of the repeated articulations of race across the economic, political, cultural, and material dimensions simultaneously, each reinforcing the others in ways that make the formation as a whole more durable than any single dimension would be on its own.

Ultimately, this reconceptualisation insists that the MW-S be understood as a confluence of economic, political, and cultural forces in which racism is not an

afterthought but a foundational logic with its own historical momentum. It is on this foundation that the colonality of power can be integrated into the framework as a substantive account of how racial hierarchy was historically formed and why it persists.

## 11.2. The Colonality of Power: Race, Knowledge, and the Persistence of Colonial Hierarchy

The heterarchical conception of power establishes that race is a foundational logic operating across all three pillars simultaneously. What it does not supply is the global-historical account of why racial hierarchy took the specific form it did, or why its persistence beyond the formal dissolution of colonial administrations requires a theoretical vocabulary exceeding the category of racism as an ideological supplement to the capitalist world-economy. The colonality of power is designed to meet this demand. It meets it precisely because it names a formation that operates simultaneously across the economic, epistemic, political, and material dimensions of the world-system, which is why heterarchical thinking is what makes its integration into W-SA possible without collapsing it into the economic pillar.

The concept begins from the distinction between colonialism and colonality. Colonialism names the period during which colonial relations were enforced through the explicit institutional presence of colonial administrations. Colonality names something structurally distinct: the patterns of power, knowledge, and social classification articulated through colonial expansion that persist as ongoing structural conditions of the world-system after the formal dissolution of those administrations. As Grosfoguel (2004: 320) establishes:

“By ‘colonial situations’ I mean the cultural, political, and economic oppression of subordinate racialised ethnic groups by dominant racial/ethnic groups, with or without the existence of colonial administrations. It is crucial to point out that ‘colonality’ in the contemporary world-system stems from the long history of European colonialism that preceded it. Five hundred years of European colonial domination and expansion formed an international division of labor between Europeans and non-Europeans that is reproduced in the present ‘post-colonial’ phase of the capitalist world-system”.

The myth of decolonisation, as Grosfoguel (2002: 208) names it, presents the formal dissolution of colonial administrations as a decisive historical break, rendering the ongoing colonality of the world-system invisible as a political arrangement from within

liberal universalism's own categories. This mythology is itself an ideological function of the geoculture: by presenting decolonisation as achieved, centrist liberal geoculture performs precisely the obfuscating mediation between the two modernities that Wallerstein's account identifies as its structural role, while concealing the racial hierarchies through which that mediation operates. Crucially, coloniality is entangled with, but is not reducible to, the international division of labour (Grosfoguel 2002: 208). The colonial axis between Europeans and non-Europeans is inscribed not only in relations of exploitation between capital and labour and domination between metropolitan and peripheral states, but in the production of subjectivities and knowledges, across all three pillars of the world-system simultaneously, which is exactly what heterarchical thinking requires the framework to register.

The global-historical foundation of coloniality is provided by Quijano's account of the co-constitution of racial hierarchy and the capitalist world-economy. As Quijano states (cited in Grosfoguel 2004: 325-326):

“Racism and ethnicization were initially produced in the Americas and then expanded to the rest of the colonial world as the foundation of the specific power relations between Europe and the populations of the rest of the world. After five hundred years, they still are the basic components of power relations across the world. Once colonialism became extinct as a formal political system, social power is still constituted on criteria originated in colonial relations. In other words, coloniality has not ceased to be the central character of today's social power”.

If racial hierarchy and the capitalist world-economy were co-constituted through colonial expansion rather than sequentially related, the treatment of racial differentiation as derivative of economic positioning is not only methodologically inadequate but historically inaccurate. Before this argument is extended, however, it is important to register a qualification that the analysis of Chapter 7 requires. Quijano's account of the co-production of race and capitalism tends to locate the origins of racial classification in the colonial encounter with the Americas in 1492, treating that moment as the historical invention of the racial categories that were subsequently generalised across the world-system.

Yet, what Chapter 7 established through the work of Robinson (1983), Virdee (2021), and Heng (2018) complicates this periodization without refuting the broader framework. Robinson's account demonstrated that the racial logic through which European civilisation organised its internal hierarchies, through the racialisation of Celtic, Slavic, and

Jewish peoples within the European feudal formation, predated the colonial encounter with the Americas by centuries and provided the conceptual and institutional resources that were exported to and amplified within the colonial encounter. Heng's analysis of racial logics in medieval Europe demonstrated that race was already operative in twelfth-century European juridical and epistemic practice, through the management of Jewish difference, the theological-racial discourse of purity of blood, and the cartographic organisation of the world into zones of Christian humanity and racialised otherness. What this means for the colonality of power is not that its overarching framework is incorrect but that its historical foundation needs to be deepened. The racial hierarchy that was co-produced with the capitalist world-economy in the long sixteenth century was not invented at that moment but absorbed and reorganised racial logics that were already centuries in the making within the European formation itself.

The colonality of the world-system therefore carries a longer history within it than Quijano's own periodization fully acknowledges: the racial logics that the colonial encounter with the Americas amplified and globalised were not created from scratch by that encounter but have been influenced by the processes of racialisation within medieval and early modern Europe that were exported there. This does not weaken the argument for the co-constitution of race and capitalism; it strengthens it, by showing that the racial formations through which the MW-S was organised had a depth and durability that cannot be explained as a response to the requirements of capitalist demands, because they predate those requirements by centuries and shaped the cultural and institutional preconditions within which the capitalist world-economy took form.

To draw further on the work established in Part II, the definition of racism the colonality of power advances extends what Chapter 8 established at the epistemic level across the political and material dimensions simultaneously. Grosfoguel (2016: 10) defines racism not as ideology or prejudice but as a structural and institutional formation constitutive of the world-system itself:

“Racism is a global hierarchy of superiority and inferiority along the line of the human that have been politically, culturally and economically produced and reproduced for centuries by the institutions of the ‘capitalist/patriarchal western-centric/Christian-centric modern/colonial world-system.’ The people classified above the line of the human are recognized socially in their humanity as human beings and, thus, enjoy access to rights (human rights, civil rights, women rights and/or labor rights), material resources, and social recognition to their subjectivities, identities, epistemologies and spiritualities. The people below the

line of the human are considered subhuman or non-human; that is, their humanity is questioned and, as such, negated”.

The line of the human is the political and institutional form of the epistemic hierarchy the Cartesian Subject and the humanist invention of Man established within the structures of knowledge. It specifies what those structures of knowledge do in the world: they distribute political recognition, epistemic authority, and material resources along the same racial demarcation through which the human was defined, and they do so across the economic, epistemic, and political pillars simultaneously. The universal promises of the modernity of liberation, rights, recognition, civic membership, are extended within a world-system whose structures of knowledge, political institutions, and spatial organisation are organised through a racial demarcation that those promises cannot reach without first contesting the line on which they are premised. This is the structural form of the Janus-faced character of liberal democracy: not a failure of implementation but a constitutive feature of the categories through which liberation is claimed.

Grosfoguel’s (2016) elaboration of Fanon’s distinction between the zone of being and the zone of non-being specifies the material and spatial form through which the line of the human operates in practice. Those above the line inhabit a zone of being, in which the predominant materiality of domination takes the form of regulation and emancipation: conflicts are managed through civil, human, and labour rights, through legal codes and mechanisms of political negotiation. Those below the line inhabit a zone of non-being, in which violence and dispossession constitute the predominant materiality of domination (Grosfoguel 2016: 12-13). The zone of non-being is not a geographical location but a position within the racial structures of domination of the world-system, operating at the global scale between centres and peripheries and at the national and local scale within metropolitan and peripheral states alike. This distinction provides the normative and political architecture that Chapter 10’s spatial analysis required but could not supply from within its own terms: the compartmentalisation of colonial territory and the residual spatial positioning of racialised populations within liberal democratic cities are the spatial form the zone of non-being takes within the MW-S, the materialisation of the line of the human through the organisation of territory, resources, and the conditions under which racialised populations live and are governed.

The implications for the political dimension are equally direct. Wallerstein (2003: 671) himself observed that if race became a theorised concept in the nineteenth century and racism an institutionalised practice, it was primarily the result of the centrality of the concept of citizenship. The coloniality of power provides the global-historical framework

within which the philosophical account Chapter 9 developed operates in practice and persists across the formal dissolution of explicitly racial legal categories. As Grosfoguel (2004: 328) establishes:

“The global coloniality of power from colonial to post-colonial times helps us understand the ongoing power of the white male elites to classify populations and exclude people of color from the categories of citizenship and from the ‘imagined community’ called the ‘nation.’ The civil, political, and social rights that citizenship provided to members of the ‘nation’ were selectively expanded over time to ‘white’ working classes, and ‘white’ middle-class women. However, ‘internal’ colonial groups remained ‘second-class citizens,’ never having full access to the rights of citizens and to the ‘imagined community’ called the nation”.

The selective expansion of civic rights Grosfoguel identifies is the historical form that liberal philosophical discourse takes when enacted through the institutions of the nation-state and the world-system: the formal universalism of citizenship is the ideological expression of a coloniality that organises the distribution of civic rights along the same racial lines co-constituted through colonial expansion and reproduced through the ongoing organisation of the world-system. The coloniality of power thus establishes for the integrated framework that racial hierarchy and the capitalist world-economy were co-produced through European colonial expansion, that this co-production was already operative within Europe before it was exported to the Americas, and that coloniality persists as a structural condition of the present under the myth of decolonisation, such that the Janus-faced nature of liberal democracy is not a contingent or historically receding feature but a condition reproduced through the institutional, epistemic, political, and material arrangements of the world-system in the present. What the coloniality of power does not fully specify is the precise political and epistemological mechanism through which this coloniality is encoded into the normative architecture of liberal political order itself, the mechanism through which the racial organisation of civic membership and the racial constitution of space appear not as political arrangements but as natural expressions of differential capacity. Such a specification is what Chapter 12 provides through the Racial Contract.

## Chapter 12. The Racial Contract, Epistemological Ignorance, and the Spatial Constitution of Liberal Order

Chapter 12 integrates the Racial Contract into W-SA in order to specify the political and epistemological mechanisms through which racial hierarchy is reproduced within liberal political order. Drawing on the work of Mills (1997), the chapter establishes how racial hierarchy is encoded within and obscured by the universalist categories of liberal political discourse, such that political subjecthood and epistemological authority are structured through racial differentiation while remaining formally universal. The chapter proceeds in two sections. The first develops the Racial Contract as a naturalized account of liberal political order, tracing how the partitioned social ontology, epistemological ignorance, and exploitation contract through which the Racial Contract operates specify the mechanisms that the analyses of Chapters 8 and 9 identified but could not, from within their own terms, fully account for. The second extends this analysis into the material organisation of space, providing the normative architecture that connects the political argument to the spatial formations traced in Chapter 10.

### 12.1. The Racial Contract, Epistemological Ignorance, and the Limits of Liberal Universalism

The colonality of power provides the global-historical foundation for understanding why racial hierarchy takes the systematic and persistent form it does within the MW-S. However, what it does not fully specify is the mechanism through which that global-historical condition is encoded into the normative architecture of liberal political order itself: the specific operation through which the formal universalism of liberal democratic institutions coexists with and requires the racial organisation of who is in practice extended their protections, how the partitioned social ontology of persons and racial subpersons is produced and reproduced within a political tradition that proclaims the equal standing of all human beings, and why the racial character of this organisation is rendered invisible as such within the very categories through which liberal democracy understands and presents itself.

The present section turns to the foundational work of Charles W. Mills, *The Racial Contract* (1997), as the theoretical resource that provides the most precise account of these mechanisms. Mills is not introduced here as an external corrective to the world-systems framework. He is introduced as the thinker whose analytical apparatus makes it possible to specify, at the level of political and epistemological mechanism, what both Wallerstein's account of the geoculture and the philosophical analyses of Chapters 8 and 9 approach but cannot, within their own terms, fully theorise.

Mills's opening methodological move is the one that makes everything else in the analysis possible. He situates the Racial Contract within the tradition of naturalized contractarianism, which he distinguishes explicitly from the idealized contract of contemporary Rawlsian political philosophy. Where the ideal contract explains how a just society would be formed, the naturalized contract explains how an actually existing unjust society was formed and how it continues to function. The precedent Mills invokes is Rousseau's *Discourse on Inequality*, in which the contract is used not to describe a just political order but to expose the inner logic of an exploitative one. As Mills (1997: 5) specifies:

"The 'Racial Contract' I employ is in a sense more in keeping with the spirit of the classic contractarians - Hobbes, Locke, Rousseau, and Kant. I use it not merely normatively, to generate judgements about social justice and injustice, but descriptively, to explain the actual genesis of the society and the state, the way society is structured, the way the government functions, and people's moral psychology. The most famous case in which the contract is used to explain a manifestly nonideal society, what would be termed in current philosophical jargon a 'naturalized' account, is Rousseau's *Discourse on Inequality* (1755). Rousseau argues that technological development in the state of nature brings into existence a nascent society of growing divisions in wealth between rich and poor, which are then consolidated and made permanent by a deceitful 'social contract.' Whereas the ideal contract explains how a just society would be formed, ruled by a moral government, and regulated by a defensible moral code, this nonideal/naturalized contract explains how an unjust, exploitative society would be formed, ruled by an oppressive government and regulated by an immoral code".

By situating the Racial Contract within the tradition of naturalized contractarianism, Mills establishes that the Racial Contract is not an external imposition upon liberal political theory but an application of its own methodological tools to the actual historical conditions under which Western political orders were formed. The same contractarian tradition that Chapter 9 traced through Hobbes, Locke, Rousseau, and Kant is here turned upon itself: its own descriptive apparatus is turned upon the conditions it describes, and what is revealed is a political order whose actual founding logic is not the agreement among equals that liberal political philosophy presents but a Racial Contract through which those constituted as White maintained political subjecthood and civic protections while those constituted as non-White were positioned as its objects rather than

its subjects. Crucially, the Racial Contract is also what Mills names a historical actuality. Where the social contract in its modern Rawlsian form has abandoned any pretension to historical explanation and retreated entirely into normative prescription, the Racial Contract can be located in specific historical events: the Treaty of Tordesillas (1494) dividing the world between Spain and Portugal, the Valladolid Conference (1550-1551) to decide whether Native Americans were fully human, the Berlin Conference (1884-1885) to partition Africa (Mills 1997: 20-21). It is not a thought experiment; it is the real political agreement that has shaped the modern world.

The substantive content of the Racial Contract, what it actually establishes about the organisation of Western political orders, is specified by Mills through the concept of a partitioned social ontology. This is the moral dimension of the contract, and it connects directly to the analysis of the Cartesian Subject developed in Chapter 8. As Mills (1997: 16-17) states:

“the color-coded morality of the Racial Contract restricts the possession of this natural freedom and equality to White men. By virtue of their complete nonrecognition, or at best inadequate, myopic recognition, of the duties of natural law, nonwhites are appropriately relegated to a lower rung on the moral ladder (the Great Chain of Being). They are designated as born unfree and unequal. A partitioned social ontology is therefore created, a universe divided between persons and racial subpersons, *Untermenschen*, who may variously be black, red, brown, yellow - slaves, aborigines, colonial populations - but who are collectively appropriately known as ‘subject races’”.

The Cartesian Subject established the conditions under which a racially specific conception of the human could present itself as universal by constituting the rational, self-grounding Subject as the standard of humanity from which all others were measured and found deficient. The partitioned social ontology of the Racial Contract is the political form of this epistemic operation: what the Cartesian Subject accomplishes at the level of knowledge, the constitution of the universal through the simultaneous constitution of the particular as deficient, the Racial Contract accomplishes at the level of political order. The moral hierarchy of persons and racialised subpersons is the political inscription of the epistemological hierarchy of rational Subject and racial object, which is why the Racial Contract is not merely a political arrangement but also a moral one: it establishes the specific moral psychology through which principles of justice applicable to the White subset of humanity mutate as they cross the colour line, so that Whites will act in racist

ways while thinking of themselves as acting morally, experiencing genuine cognitive difficulties in recognising certain behaviour patterns as racist (Mills 1997: 93-94).

The political consequence of the partitioned social ontology is that the state itself cannot be considered neutral. As Mills (1997: 14) establishes:

“And the purpose of this state, by contrast with the neutral state of classic contractarianism, is, inter alia, specifically to maintain and reproduce this racial order, securing privileges and advantages of the full white citizens and maintaining the subordination of nonwhites. Correspondingly, the ‘consent’ expected of the white citizens is in part conceptualized as a consent, whether explicit or tacit, to the racial order, to white supremacy, what could be called Whiteness.”

This passage specifies what Wallerstein’s account of the geoculture cannot, from within its own terms, fully theorise: that the liberal political order does not simply coexist with racial hierarchy but is constituted through it, and that the civic consent through which liberal legitimacy is reproduced is itself a consent to the racial organisation of the political community. The geoculture of the MW-S, which Wallerstein identifies as the obfuscating mediator between the two modernities, performs its obfuscating function precisely because the racial terms of the contract are not acknowledged as racial within the universalist categories through which the political order presents itself. Race is, as Mills (1997: 14) states on the same page, in no way an afterthought, a deviation from ostensibly raceless Western ideals, but rather a central shaping constituent of those ideals.

The specific engagements with Hobbes, Locke, and Kant that Mills develops provide exactly the specification that the philosophical analysis of Chapter 9 requires but could not, from within the philosophical analysis alone, fully supply. In the case of Hobbes, Mills identifies a tacit racial logic in the very example Hobbes deploys to establish the reality of the state of nature: his sole real-life instance of persons actually living in permanent disorder is ‘the savage people in many places of America’ (*Leviathan* cited in Mills 1997: 64). As Mills (1997: 65) establishes:

“the literal state of nature is reserved for nonwhites; for whites the state of nature is hypothetical. The conflict between whites is the conflict between those with sovereigns, that is, those who are already (and have always been) in society [...] the most notorious state of nature in the contractarian literature - the bestial war of all against all - is really a nonwhite figure, a racial object lesson for the more rational

whites, whose superior grasp of natural law [...] will enable them to take the necessary steps to avoid it and not to behave as ‘savages.’”

The redefinition of the state of nature along racial lines is extended in Mills’s reading of the contractarian tradition to establish what non-White peoples represent within the political architecture of liberal order. As Mills (1997: 13) establishes:

“The role played by the ‘state of nature’ then becomes radically different. In the white settler state, its role is not primarily to demarcate the (temporarily) prepolitical state of ‘all’ men (who are really white men), but rather the permanently prepolitical state [...] of nonwhite men. The establishment of society thus implies the denial that a society already existed; the creation of a society requires the intervention of white men, who are thereby positioned as already sociopolitical beings. White men who are (definitionally) already part of society encounter nonwhites who are not, who are ‘savage’ residents of a state of nature characterized in terms of wilderness, jungle, wasteland”.

Non-White peoples are not positioned as pre-political in a temporary or developmental sense, as though they might eventually accede to the full standing of civic membership: they are constituted as permanently pre-political, which is why the spatial organisation of the Racial Contract takes the form it does. This is the link between the political argument of Section 12.1 and the spatial argument of Section 12.2: the permanent pre-political status of racialised populations under the Racial Contract is what licenses the spatial organisation through which those populations are confined to zones of abandonment and non-recognition rather than protection and civic life.

The Kantian dimension provides the sharpest formulation. Chapter 9 traced how Kant’s distinction between active and passive citizenship consolidated the racial logic of political differentiation at precisely the moment when it was most systematically articulated as a universal principle. Mills’s account of Kant’s anthropological writings establishes that this political differentiation was underwritten by an explicit racial hierarchy, through which skin colour constituted evidence of superior, inferior, or no ‘gift’ of ‘talent,’ such that, in Emmanuel Eze’s summary drawn on by Mills (1997: 70-71), full personhood for Kant is actually dependent upon race, and the black person can accordingly be denied full humanity since full and ‘true’ humanity accrues only to the White European.

The implication Mills draws is the concentrated formulation of what the philosophical analyses of Chapters 8 and 9 have been building toward: ‘Modern moral

theory and modern racial theory have the same father' (Mills 1997: 71). The Janus-faced character of liberal modernity reaches its sharpest philosophical expression in Kant: the same thinker who articulated the universal moral law as the ground of equal human dignity also provided the most systematic philosophical account of why that dignity was racially distributed.

There is a further dimension of the Racial Contract that has direct bearing on the world-systems argument of Part I and connects the analysis to the economic pillar in ways the present project requires: the Racial Contract is also, and fundamentally, an exploitation contract. As Mills (1997: 32-33) establishes:

“the economic dimension of the Racial Contract is the most salient, foreground rather than background, since the Racial Contract is calculatedly aimed at economic exploitation. The whole point of establishing a moral hierarchy and juridically partitioning the polity according to race is to secure and legitimate the privileging of those individuals designated as white/persons and the exploitation of those individuals designated as nonwhite/subpersons [...] Globally, the Racial Contract creates Europe as the continent that dominates the world”.

This passage establishes the relationship between the Racial Contract and Wallerstein's economic analysis in precise terms. Chapter 7 demonstrated that Wallerstein's framework treats racial hierarchy as derivative of economic positioning. What Mills's account adds is the specification that the racial and the economic are not sequentially related but co-constitutive: the whole point of establishing a moral hierarchy along racial lines, Mills argues, is to secure and legitimate economic exploitation. The racial hierarchy of the contract does not merely reflect an underlying economic structure; it is the normative and juridical mechanism through which economic exploitation is rendered legitimate and reproducible. This deepens the critique of Wallerstein's framework and brings Mills into direct convergence with what the colonality of power established in Section 11.2: economic relations of historical capitalism were themselves constituted through racial hierarchy from their inception.

At the epistemological level, however, the Racial Contract makes its most distinctive contribution to the argument of this project. Mills insists that the contract is not only political and economic but epistemological as well; it prescribes for its signatories a specific cognitive orientation toward the social world, what Mills names as the epistemology of ignorance. As Mills (1997: 18) specifies:

“Thus in effect, on matters related to race, the Racial Contract prescribes for its signatories an inverted epistemology, an epistemology of ignorance, a particular pattern of localized and global cognitive dysfunctions (which are psychologically and socially functional), producing the ironic outcome that whites will in general be unable to understand the world they themselves have made”.

The formulation ‘inverted epistemology’ is crucial and distinguishes epistemological ignorance from simple unawareness. An inverted epistemology is a systematic cognitive orientation organised to see the world wrongly in specific ways, with the assurance that this set of mistaken perceptions will be validated by White epistemic authority. The Racial Contract requires this inverted epistemology as a structural condition of its own operation, because a contract whose terms were openly acknowledged could not maintain the universalist self-presentation through which it sustains itself. The connection to the Cartesian Subject of Chapter 8 is direct: Grosfoguel’s account of the *ego conquistus* established that Descartes’ claim to universal epistemic authority was constituted from within the colonial power matrix rather than from the neutral position of pure Reason it presents itself as occupying, such that the Cartesian Subject that became the epistemic epicentre of Western structures of knowledge could present itself as universal precisely by rendering the colonial conditions of its own production invisible. The epistemological ignorance that Mills identifies as the mechanism of the Racial Contract is the political and social form of this same operation: the claim to apprehend the social world from the perspective of neutral rationality is the mechanism through which the racial organisation of the political order disappears from view. The obfuscating mediator that centrist liberal geoculture constitutes derives its obfuscating power from precisely this epistemological operation, as the racial organisation of who can lay claim to the promises of liberation is invisible from within the very categories through which those promises are proclaimed.

A further dimension of Mills’s analysis directly relevant to the argument is the periodization of the Racial Contract into two phases. The first phase is that of *de jure* White supremacy, the epoch of European conquest, African slavery, and European colonialism in which the Racial Contract was explicit, making clear that Whites were the privileged race and that the egalitarian social contract applied only to them (Mills 1997: 73). The second phase, which is the present, is characterised by the formal extension of the social contract’s terms to everyone, but by the persistence of *de facto* White supremacy through the social, political, cultural, and economic legacies of the conquest. As Mills (1997: 73-74) establishes:

“The Racial Contract continues to manifest itself, of course, in unofficial local agreements of various kinds (restrictive covenants, employment discrimination contracts, political decisions about resource allocation, etc.). But even apart from these, a crucial manifestation is simply the failure to ask certain questions, taking for granted as a status quo and baseline the existing color-coded configurations of wealth, poverty, property, and opportunities, the pretence that formal, juridical equality is sufficient to remedy inequities created on a foundation of several hundred years of racial privilege, and that challenging that foundation is a transgression of the terms of the social contract”.

This periodization connects directly to the coloniality of power established in Section 11.2 and to the Goldberg paradox that Chapter 9 identified as the clearest expression of the liberal contradiction in practice. The coloniality of power established that the formal dissolution of colonial administrations does not dissolve the coloniality of the world-system, that global social power continues to be constituted on criteria that originated in colonial relations. Mills’s *de jure* and *de facto* periodization provides the political and juridical specification of this persistence: in the present period, the Racial Contract maintains itself not through explicit racial legislation but through the failure to ask certain questions, through the epistemological operation that takes the colour-coded configurations of the present as a neutral baseline rather than as the legacy of centuries of racial privilege. The Goldberg paradox, the simultaneous declaration of the moral irrelevance of race and the multiplication of racial identities and exclusions, is, on Mills’s account, not a paradox at all: it is the precise operation of the Racial Contract in its *de facto* phase. The declaration of racial irrelevance is the epistemological mechanism through which the ongoing racial organisation of the political order is rendered invisible, such that racial distinctions can be multiplied and institutionalised within a political structure that claims to have moved beyond them.

Furthermore, Mills’s account of the Racial contract’s explanatory superiority over the raceless social contract provides the theoretical formulation that the central claim of this project has been building toward. As Mills (1997: 122) states:

“The ‘Racial Contract’ explodes this picture as mythical, identifying it as itself an artifact of the Racial Contract in the second, *de facto* phase of White supremacy. Thus - in the standard array of metaphors of perceptual/conceptual revolution - it effects a gestalt shift, reversing figure and ground, switching paradigms, inverting ‘norm’ and ‘deviation,’ to emphasize that non-White racial exclusion from

personhood was the actual norm. Racism, racial self-identification, and race thinking are then not in the least ‘surprising,’ ‘anomalous,’ ‘puzzling,’ incongruent with Enlightenment European humanism, but required by the Racial Contract as part of the terms for the European appropriation of the world. So in a sense standard contractarian discussions are fundamentally misleading, because they have things backward to begin with: what has usually been taken (when it has been noticed at all) as the racist ‘exception’ has really been the rule; what has been taken as the ‘rule,’ the ideal norm, has really been the exception”.

This reversal of figure and ground is the precise analytical move the argument of this project requires. If racism and racial exclusion have been the rule rather than the exception within the MW-S, then the Janus-faced character of liberal democracy is not the product of liberal universalism’s failure to live up to its own ideals but of ideals that were from the outset constituted through the Racial Contract, through the partitioned social ontology, the inverted epistemology, and the exploitation contract that together maintain the racial polity beneath the universalist face through which it presents itself.

## 12.2. The Racial Contract and the Constitution of Space

Finally, there is a spatial dimension to the Racial Contract that requires sustained analytical attention because it is the theoretical bridge between the analysis of Section 12.1 and the spatial analysis of Chapter 10. Chapter 10 demonstrated that racial hierarchy is not merely mapped onto space through the macro-economic logic of the axial division of labour but actively constituted through spatial organisation itself. What Chapter 10 could not fully specify was the normative architecture through which the racial organisation of space is connected to the political order of liberal democracy, the mechanism that makes spatial abandonment consistent with liberal universalism’s claims rather than its visible contradiction. The racial contract provides precisely this specification.

At the macrolevel, the racial contract establishes what Mills names the moral cartography that accompanies European mapping of the world, through which entire regions, countries, and continents are invested with moral qualities that determine their political status. As Mills (1997: 46-47) establishes:

“Morally, vice and virtue are spatialized, first on the macrolevel of a moral cartography that accompanies the literal European mapping of the world, so that entire regions, countries, indeed continents, are invested with moral qualities [...]

The non-European state of nature is thus actual, a wild and racialised place that was

originally characterized as cursed with a theological blight as well, an unholy land. The European state of nature, by contrast, is either hypothetical or, if actual, generally a tamer affair, a kind of garden gone to seed, which may need some clipping but is really already partially domesticated and just requires a few modifications to be appropriately transformed - a testimony to the superior moral characteristics of this space and its inhabitants.”

This passage provides the normative specification for what Chapter 10 traced materially through Heng’s analysis of the medieval *mappamundi*: the cartographic tradition organised space around the Christian cross with Jerusalem at the centre, locating racialised others at the edges of the known world and constituting the European Christian subject at its centre through that act of spatial differentiation. What Mills establishes is that this cartographic operation is not incidental to the Racial Contract but internal to its political logic: the moral cartography distributes political and pre-political space before conquest and colonial settlement, establishing the normative justification for spatial seizure through the racial constitution of non-European space as wild, uncultivated, and permanently pre-political. The tacit racial logic Mills identifies in Hobbes’s use of the Americas as his only real-life state of nature is the philosophical expression of this spatial operation: the literal state of nature is reserved for non-Whites because non-European space has already been constituted through the moral cartography of the contract as the space of permanent pre-political existence, the condition against which White rationality and civic capacity are defined.

At the local level, the spatial logic of the Racial Contract persists after the founding colonial encounter through the organisation of the city and the neighbourhood along racial lines. As Mills (1997: 47-48) establishes:

“it is not merely that space is normatively characterized on the macrolevel before conquest and colonial settlement, but that even afterward, on the local level, there are divisions, the European city and the Native Quarter, Whitetown and Darktown, suburb and inner city [...] The Racial Contract demarcates space, reserving privileged spaces for its first-class citizens”.

The persistence of this spatial logic into the metropolitan present is given its sharpest formulation by Mills in the following passage (1997: 48):

“those associated with the jungle take the jungle with them [...] the white space is patrolled for dark intruders, whose very presence, independently of what they may or may not do, is a blot on the reassuring civilized whiteness of the home space”.

The racial constitution of space does not dissolve when colonial legislation is formally ended: the jungle travels with the bodies constituted as its natural inhabitants. As Mills (1997: 49) establishes, space has historically been represented as empty or unappropriated wherever non-European peoples inhabit it, from the ‘virgin territories’ of the settler colonial encounter to the ‘wasteland’ of the inner city: in each case, the space is constituted as normatively open for intervention, improvement, or seizure through the racial logic that denies genuine social and political existence to those who occupy it. Locke’s argument that God gave the world to the industrious and rational, which Chapter 9 traced as a foundational philosophical justification for colonial dispossession, is the contractarian expression of this same spatial logic: the land is constituted as empty not because it is uninhabited but because its inhabitants have been racially constituted as incapable of the appropriation that counts.

The spatial formations Chapter 10 traced through Fanon’s account of the colonial city, Du Bois’s documentation of the racially organised urban geography of Philadelphia, and Simone’s account of the residual body are the material form that the Racial Contract’s local spatial logic takes within the MW-S. Mills’s account establishes that these formations are not merely material arrangements produced by economic positioning: they are the *de facto* forms the Racial Contract’s spatial logic takes in the metropolitan present after the formal dissolution of explicitly racial legislation, suburb and inner city, protected neighbourhood and abandoned zone, the normative and juridical architecture that the contract requires and that liberal universalism’s epistemological ignorance renders invisible as a political arrangement.

Those relegated to the zone of non-being that Section 11.2 identified through Grosfoguel’s elaboration of Fanon, those subject to violence and dispossession rather than regulation and emancipation, inhabit precisely the spaces that the Racial Contract’s moral cartography has constituted as permanently pre-political, spaces from which the promises of the modernity of liberation are structurally withheld not by accident but by the foundational logic of the contract through which the liberal political community was constituted. Space is racialised through the moral cartography; race is spatialized through the material organisation of territory; and the mutual constitution of race and space that Chapter 10 established as its organising claim finds its normative and political specification in the racial contract, completing the theoretical integration through which

Part III constructs the framework adequate to establishing the Janus-faced character of liberal democracy as a constitutive and historically durable feature of the MW-S.

## Chapter 13. Conclusion: Race, the Obfuscating Mediator, and the Modern World-System

To conclude, this thesis opened with an account of the MW-S in which centrist liberal geoculture functions as the obfuscating mediator between the modernity of technology and the modernity of liberation: proclaiming the universal promises of freedom, equality, and political inclusion while institutionalising hierarchy and exclusion which the capitalist world-economy requires. The concept of the Citizen stood at the centre of this account as the discursive figure through which the tension between the two modernities is managed and concealed, embodying the universalist language of the modernity of liberation while simultaneously demarcating through racial criteria who afforded its protections and who is not. The project committed itself from the outset to establishing that the coexistence of universalist promise and racialised exclusion within liberal democracy is constitutive rather than contingent: not a failure of liberal ideals to live up to their own logic but a structural feature of the MW-S, embedded within the very categories through which those ideals are proclaimed and reproduced. The present chapter draws together the historical, structural, epistemic, political, and spatial dimensions of the analysis in direct relation to the research questions that have guided it, before addressing the limits of the project and the avenues for research it opens.

### 13.1. Returning to the Research Questions

RQ1 asked how race has been theorised within W-SA and why predominantly economic-centred approaches reach their limits in accounting for race as a formative logic of the MW-S. Part I established that Wallerstein's account of the world-system provides the most structurally adequate macro-historical framework available for understanding the capitalist world-economy, its *longue durée*, and the geocultural formations through which its operations are legitimated and reproduced. Wallerstein himself identifies the symbiotic pairing of universalism and racism as the twin doctrines stabilising the geoculture of the world-system, and his account of centrist liberalism as the dominant ideological formation of the MW-S contains the resources for a genuinely race-critical analysis. The problem, as Chapter 7 established, is structural rather than incidental: the hierarchical architecture through which W-SA conceptualises power constrains race to appearing as an ideological supplement to the economic pillar rather than as a foundational logic co-constitutive of the world-system across all three pillars simultaneously. The temporal and conceptual foreclosure this entails is twofold. Temporally, it treats racial formations operative in

Europe across the twelfth to fifteenth centuries as pre-capitalist residues whose full significance only emerges retrospectively once capitalism provides the matrix within which they can be understood. Conceptually, it prevents the epistemic, political, and spatial dimensions of racial formation from appearing as co-constitutive logics in their own right rather than as ideological expressions of economic relations. Chapter 11 addressed this limitation through the integration of heterarchy and the colonality of power, establishing that the pillars of the world-system operate in co-constitutive relation without any single one exercising necessary primacy, and that racial hierarchy was co-produced with the capitalist world-economy through European colonial expansion and persists as a structural condition of the present under the myth of decolonisation. The answer to RQ1 is therefore that W-SA theorises race as derivative of economic positioning because its hierarchical conception of power requires it to do so, and that this limitation is overcome not by abandoning the framework but by incorporating heterarchy and colonality as the conceptual resources that allow race to be theorised as a foundational logic operative across the formation as a whole.

RQ2 asked how race functions as a formative logic within liberalism, shaping its universalist claims, political subjecthood, and regimes of inclusion and exclusion. The answer assembled across Chapters 8, 9, and 12 is that race functions as a foundational logic internal to the central categories of liberal political thought rather than as an external imposition upon otherwise neutral philosophical foundations. Chapter 8 established that the humanist invention of Man and the constitution of the Cartesian Subject were from their inception entangled with colonial expansion and racial differentiation: the *ego cogito* was preceded by the *ego conquistus*, as Dussel demonstrates, and the universal rational Subject that became the normative standard of knowledge and humanity was constituted through the simultaneous constitution of racialised others as deficient, irrational, and pre-modern. Chapter 9 traced how these epistemic conditions were carried into liberal political discourse through Hobbes, Locke, Rousseau, and Kant, demonstrating that the criteria of rationality, moral capacity, and civic virtue through which the Citizen was constituted were articulated within and shaped by a world structured through racial hierarchy. Race functions within liberalism not as a distortion of its universalist principles but as the organising logic through which those principles were developed and through which they continue to operate. Section 12.1 provided the most precise specification of this mechanism through Mills's account of the racial contract's partitioned social ontology and epistemological ignorance: the liberal political order is constituted to maintain and reproduce racial hierarchy, and the civic consent through which the legitimacy of centrist

liberalism is reproduced, is a consent to the racial organisation of the political community that cannot be acknowledged as such within the universalist categories through which that community presents itself.

RQ3 asked how race is embedded within the structures of knowledge that underpin the MW-S prior to its formal codification within political institutions and law. Chapter 8 answered this directly through the analysis of the humanist invention of Man and the constitution of the Cartesian Subject. The displacement of theological authority by secular epistemic formations in Renaissance humanism and Enlightenment philosophy produced a racially particular conception of the human that presented itself as universal whilst establishing gradations of humanity through which racial hierarchy was rendered intelligible and legitimate within the structures of knowledge before it was codified in law or institutionalised in colonial administration. As Grosfoguel establishes through the figure of the *ego conquistus*, the Cartesian Subject claiming universal rational authority was constituted from within the colonial power matrix, such that the claim to speak for all of humanity from a position of neutral rationality was in practice the claim of a racially specific location to present itself as universal by rendering its own conditions of production invisible. The structures of knowledge through which European universalism acquired hegemony within the world-system are therefore racial at their foundations. This is not incidental to the geoculture of the world-system but constitutive of it: the cultural hegemony that Wallerstein identifies as the basis of centrist liberalism's dominance rests upon epistemic foundations prepared by the racial architecture of Western knowledge itself, which is why the critique developed in Chapter 8 is a critique of the geoculture's foundations rather than of its ideological effects.

RQ4 asked how these racialised epistemic formations are articulated and reproduced over time within geoculture, political discourse, and the institutions of liberal democratic orders. The answer runs across the full arc of the thesis. Chapter 9 established that the racialised epistemic formations of Chapter 8 are not simply inherited by liberal political discourse but actively elaborated through it: the criteria of political belonging are organised through racial hierarchy across two centuries of liberal thought, from Hobbes's tacit racial logic in the state of nature through Locke's theory of property to Kant's colour-coded hierarchy of capacities for rational self-governance. The figure of the Citizen does not displace the Cartesian Subject but builds upon it, translating the racial architecture of Western knowledge into the political criteria of civic membership. Section 11.2 established through the colonality of power that these formations persist across the formal dissolution of

colonial administrations: the myth of decolonisation presents the end of colonial rule as a decisive break, but the racial criteria through which the capitalist world-economy was organised continue to structure the distribution of civic rights, epistemic authority, and material resources within the post-colonial world-system. Section 12.1's account of epistemological ignorance specified the mechanism through which this reproduction operates in the present: the racial contract prescribes an inverted epistemology through which the ongoing racial organisation of the political order disappears from view within the very categories of liberal universalism that the racial contract requires. The geoculture of the world-system derives its obfuscating power from precisely this epistemological operation: it can proclaim the modernity of liberation because the racial contract ensures that the systematic denial of liberation to racialised populations appears not as a political arrangement but as the natural expression of differential capacities that the criteria of liberal citizenship identify and merely reflect.

RQ5 asked how the material organisation and management of space under liberal democratic orders articulates with and reinforces the structures of knowledge through which racial hierarchy is rendered empirically visible and self-evident. Chapter 10 established that the relationship between race and the material organisation of territory is not sequential or derivative but mutually constitutive: space is racialised and race is spatialized as a relation of mutual co-constitution through which racial hierarchy is both enacted and naturalised at the material level. The medieval *mappamundi* established that space was already organised as a racialising technology before capitalism consolidated its global form. Fanon's colonial city demonstrated that racial subjectivity is inscribed through the lived organisation of deprivation, confinement, and differential exposure. Du Bois's documentation of Philadelphia established that the racial organisation of urban geography is sustained through the apparent incapacity of racialised populations for full civic standing while simultaneously articulating the material conditions that make the appearance of that incapacity self-evident and self-confirming. Simone's analysis of the residual body extended this into the contemporary liberal democratic city, where racialised populations inhabit territory simultaneously marked as their proper place and as peripheral to the processes through which civic life is reproduced. Section 12.2 provided the normative specification this account required: the racial contract's moral cartography distributes political and pre-political space before and after colonial settlement, establishing the normative justification for spatial seizure through the racial constitution of non-European and racialised space as permanently pre-political. The *terra nullius* logic of colonial appropriation and the urban jungle of the metropolitan present are expressions of the same

spatial logic: space is constituted as normatively open for intervention, improvement, or abandonment wherever its inhabitants have been racially constituted as incapable of the appropriation or civic standing that counts.

### 13.2. Synthesis: The Janus-Faced Character of Liberal Democracy

What the research questions, taken together, establish is that the Janus-faced character of liberal democracy is not a paradox but a foundation with inherent clarity: the coexistence of universalist promise and racialised exclusion is partially produced and reproduced through the historically specific articulation of race across the epistemic, political, and material dimensions of the MW-S simultaneously. The closing syntheses of Chapters 9 and 10 named this relationship from two distinct but mutually constitutive analytical perspectives that the integrated framework of Part III now holds in productive relation.

Chapter 9 established that the liberal Citizen is not the innocent expression of Enlightenment universalism but the political form of a community of the free whose criteria of membership have always been racially organised. The criteria of rationality, moral capacity, and civic virtue through which political standing was progressively conditioned were not neutral categories subsequently inflected by racial assumptions; they were articulated within and shaped by a world structured through racial hierarchy, and their elaboration across the liberal tradition extended and refined that hierarchy in ways that rendered it politically operative and institutionally durable. Chapter 10 established that this political and epistemic formation is not confined to the philosophical and institutional level but is materially enacted through the organisation of space: the cause is the consequence, as Fanon names it, in that the spatial arrangements through which racialised populations are confined to zones of deprivation and abandonment simultaneously articulate the racial hierarchy that sustains them and naturalise that hierarchy as the self-evident expression of differential capacity rather than as the outcome of a political arrangement.

The integrated framework of Part III now specifies the mechanism through which these two dimensions are held together within liberal order. Heterarchy establishes that this articulation cannot be derived from a single determining logic: race is embedded simultaneously within the structures of knowledge, the political criteria of civic membership, the normative architecture of the racial contract, and the material organisation of space, and the durability of racial formation across transformations at any single level follows precisely from this multi-level entanglement. The colonality of power establishes the global-historical conditions within which this formation persists: the racial hierarchy that was co-produced with the capitalist world-economy through European colonial

expansion is not a residue of a formally ended past but a structural condition of the present, reproduced through the institutional, epistemic, political, and spatial arrangements of the world-system under the myth of decolonisation. The Racial Contract specifies the political and epistemological mechanism through which coloniality is encoded into the normative architecture of liberal political order itself: the partitioned social ontology through which persons and racial subpersons are constituted, the exploitation contract through which the economic co-constitution of race and capitalism is organised, and the epistemological ignorance through which the racial organisation of liberal order disappears from view within the very categories through which it presents itself.

Read together, these three frameworks establish what the immanent and ideological critique pursued throughout this project arrives at from the inside: the universalist claims of liberal democracy are contradicted because they were constituted through a racial contract whose terms they institutionalise and whose epistemological ignorance they require. This is not a claim that liberal democracy is simply a mask for racial domination, nor that its universalist aspirations are meaningless. It is the more precise claim that Mills names through the figure-ground reversal: what has been taken as the racist exception has really been the rule, and what has been taken as the rule has really been the exception. The Janus-faced character of liberal democracy is the constitutive form the MW-S takes at the level of its political and cultural expression. Its universalist face and its racially organised underside are not in contradiction but in articulation, held together through the geocultural formations, structures of knowledge, and material arrangements through which racial hierarchy is simultaneously enacted and rendered invisible as such within liberal order's own categories.

### 13.3. Limitations of the Research

Any project of this scope carries limitations that one must be honest about. The first concerns the scope of the critique of economic reductionism. The project established, through Hall's distinction between economic and sociological approaches to race, that W-SA falls firmly within the economic camp: it attributes racial and ethnic divisions principally to economic structures and processes, treating race as a *post hoc* appendage to class struggle rather than as a foundational logic with its own historical momentum. The critique developed across Parts I and II challenged this reduction by demonstrating that race is embedded within the structures of knowledge, the political criteria of civic membership, and the material organisation of space in ways that exceed and cannot be derived from the economic pillar. What the project does not fully address, however, is the

corollary of Hall's argument: that race and class cannot simply be separated any more than they can be collapsed.

As Hall (2021) establishes, economic and sociological approaches are each partial corrections of the other's weakness, and the adequate theoretical framework must preserve both the materialist terrain of structural analysis and the relative autonomy of racial and cultural formations without reducing either to the other. The present project has made the case for race's irreducibility to class. What it has not sustained is a full analysis of what Hall names racialised class: the recognition that individuals and collectivities are shaped simultaneously by racial identities, class identities, and the racialised class formations through which these are co-constituted. The racial organisation of labour, the racial distribution of surplus, and the racial constitution of class position within the capitalist world-economy are dimensions of racial formation that the integrated framework assembled here is equipped to address but does not develop in detail. A project that takes racialised class as its analytical object, rather than race's relative autonomy from class, would extend the argument into precisely the territory the present thesis identifies as foundational but leaves underexplored.

The second limitation concerns the geographical scope of the analysis. The project focuses deliberately on the European and North Atlantic tradition of liberal democracy, engaging with liberalism as it developed through Hobbes, Locke, Rousseau, and Kant and as it has been institutionalised within Western political orders. This focus is methodologically consistent with the project's central claim: that the Janus-faced character of liberal democracy is constitutive of the tradition at the level of its founding categories rather than a regional variant of a more general form. It is nonetheless a focus that leaves underexplored the ways in which liberal democratic discourse has been received, contested, and transformed within peripheral and semi-peripheral formations, and the decolonial and postcolonial political traditions that have produced their own accounts of liberalism's racial constitution from positions outside the European core. These traditions extend and contest the argument the thesis makes in ways that would both deepen and complicate it, and their sustained engagement represents a significant site for future research.

The third limitation concerns gender and sexuality, and it requires direct acknowledgement of the feminist critique this project invites. A race-critical project that does not develop a sustained account of how gender and sexuality are co-constitutive with racial hierarchy within the MW-S is open to the charge that it reproduces, at its own analytical level, the same selective focus it identifies as a limitation in Wallerstein. That charge is legitimate and the present project does not dispute it. The defence, however, is

methodological rather than evasive. To collapse race and gender together within a single analytical account would be to repeat precisely the reductionist move the thesis identifies as Wallerstein's foundational error: the subordination of one formation to another within a framework that, in its current form, cannot preserve both in their full historical depth simultaneously. Wallerstein subsumes the story of race and the story of gender within the same class logic, treating both as "not too different" from one another (Wallerstein 2003: 654). What the thesis has established is that race cannot be derived from class because it has its own historical depth, its own formations, and its own constitutive force within the world-system. The same argument applies to gender and sexuality: they cannot be derived from race any more than race can be derived from class, and a project that assimilates the analysis of gender and sexuality into the analysis of race, treating them as parallel expressions of the same racial logic, would reproduce the reductionism it critiques.

Race, gender, and sexuality each require their own sustained historical and theoretical treatment before their articulation with one another can be adequately theorised. The work of María Lugones (2007; 2010) on the colonality of gender establishes that Quijano's own account of colonality undertheorizes gender in precisely the way that Wallerstein undertheorizes race, and that the gender system is not simply an effect of colonial racial hierarchy but a co-constitutive formation with its own historical momentum. The present project is designed to be extensible in the direction these scholars open, and it is the contention of this thesis that establishing the depth and autonomy of racial formation within the world-system is a necessary prior step to the fuller analysis of its articulation with gender and sexuality that remains to be undertaken.

#### 13.4. Possibilities for Future Research

The limitations of the project are at the same time the most productive sites for future research. The most immediately generative direction would be an empirical extension of the integrated framework: applying the analytical tools assembled in Part III to specific contemporary policy domains in which the Janus-faced character of liberal democracy is most concretely operative. Immigration enforcement, policing and carceral policy, housing and spatial organisation, and the political economy of austerity are all domains in which the racial contract's *de facto* phase can be traced in its specific institutional forms, and in which the articulation of racial hierarchy across the epistemic, political, and material dimensions the thesis has theorised can be examined at the level of concrete governmental practice. Such research would test and deepen the integrated framework by submitting it to the demands of empirical specificity.

A second direction would be a comparative analysis of how different national formations within the world-system have produced variant articulations of the Janus-faced character of liberal democracy. The thesis has focused on the general form of the constitutive relationship between liberalism and racial hierarchy, but that relationship takes historically specific and institutionally distinct forms across different national and regional contexts. A comparative engagement with the ways in which peripheral and semi-peripheral liberal democratic formations have negotiated the racial contract under coloniality would address one of the most significant geographical limitations of the present project and extend the race-critical W-SA framework into a genuinely comparative register.

A third direction concerns the politics of transformation. The thesis has established that the Janus-faced character of liberal democracy is constitutive rather than contingent, and that its durability follows from the multi-level articulation of racial hierarchy across the economic, epistemic, political, and material dimensions simultaneously. What follows from this for the politics of racial justice remains an open question that the present project does not address directly. The heterarchical character of the formation implies that interventions at any single level, while insufficient on their own to transform the *longue durée* as a whole, are capable of producing genuine if bounded effects whose cumulative significance depends on how they articulate with interventions at other levels. A sustained engagement with decolonial, abolitionist, and race-critical political theory, with the question of what forms of collective agency are adequate to challenging a formation constituted through the multi-level articulation of racial hierarchy, would extend the theoretical work of this project into the domain of political possibility that the analysis consistently gestures toward but deliberately holds at its horizon.

In closing, the present project has been a diagnostic and integrative enterprise: tracing the racial logics of the MW-S across its epistemic, political, and material dimensions, and assembling a theoretical framework adequate to holding that multi-level analysis together without reducing it to a single determining logic. In doing so, it has demonstrated that the Janus-faced nature of liberal democracy is not a problem that liberal democracy can solve from within its own terms, because the Racial Contract is internal to those terms. What lies beyond this demonstration is the question of what a politics adequate to that diagnosis would look like, a question the contemporary moment must continue to ask itself.

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