

A Comparison of Weber's and Wallerstein's Historical Methods: The Contribution of Weber's Methods in Developing Existing world-systems Methods

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The historical methods of Max Weber and Immanuel Wallerstein have expanded the scope of comparative historical sociology and enhanced the quality of comparative historical research. However, there are few comparisons of their historical methods in the field of comparative historical sociology due to the incompatibility of their competing epistemological paradigms. This study aims to compare Weber's historical method with that of Wallerstein to identify their similarities and determine how Weber's approach can improve existing world-systems methods. By doing so, this research opens the door to the development of Wallerstein's and other world-systems researchers' methods.

Keywords: Max Weber, Immanuel Wallerstein, methods, historically constituted ideal type, total history, the inter-part relationship, incorporating dynamics

Introduction

Historical sociology, derived from Western Europe and developed in the US, has progressed remarkably thanks to many prominent sociologists. Among them are Max Weber and Immanuel Wallerstein, who contributed significantly to the study of historical sociology and its associated research by pioneering their own academic territories. This study will probe and compare Weber's and Wallerstein's historical sociological approaches.

One might ask, why does a comparison between Weber and Wallerstein, both of whom are considered accomplished historical sociologists, actually matter at this point? To explain this, we must look into a new trend that has recently formed within the field of historical sociology and international history, as historical sociology and international history communities have been increasingly critical of methodological nationalism or cross-national comparison, which has, in turn, prompted more scholars to begin examining the connections among history, globalization, global history, global dynamics, and postcolonial globalization (e.g., Anievas and Martin 2015, 2016; Ascione and Chambers 2016; Buzan and Lawson, 2015; Dirlik 2007; Lin 2012; Osterhammel 2009; Stanziani 2018). This has led to the introduction of global historical sociology (Go and Lawson 2017), radical postcolonial narratives in the era of globalization (Bhambra 2016), and to the macroscopic analysis of incorporated social science studies and an understanding of the national and local changes in global dynamics that Wallerstein advocated.¹ Inevitably, Wallerstein's methodological approaches have come under new examination and receive more support today.

On the other hand, Weber's historical sociology approaches—from rational choice theory (Kiser and Hechter 1998; Levi 1997), analytical Weberianism highlighting agency theory (Kiser and Baer 2005; Kiser and Schneider 1995), theory of politics (Collins 1986), economic sociology (for theoretical applicability of Weber's economic sociology, see Dobbin 2005;

¹ Wallerstein presented the spatial concept of the modern world-system (i.e., "the structural space of the capitalist world-economy"), which helps to analyze inter-state relationships or the points of rise and fall of individual countries within the transnational entity" (Wallerstein 2001: 142). Wallerstein's perspective encompasses a) connected history between the West and the Rest, especially emphasizing on the impacts of the West, b) global history especially dealing with a modern world, c) global political economy highlighting the dynamics of global capitalism, and d) the discourse of global south. In addition to this, Wallerstein's idea—"the decentering of Europe within the contemporary process of capitalist accumulation" (Feldman 2001)—brings forth a bit of theoretical empathy for post-colonial theorists.

Granovetter 1985; Smelser and Swedberg 2005; 8-10; for the roles of political institutions in economic systems, see Whitley 1992; Dobbin 1994), cultural and psychosocial approach (Jäger and Wiskind 1991), and eventful historical issues (Bendix 1946) to macro-historical sociology subjects, such as the sociology of civilizations (Kalberg 2012)—have been quoted by other historical sociologists. Although Weber's strong theoretical obsession with modernization came under heavy criticism in the past, his historical sociology undeniably remains a stepping stone used by historical sociologists to analyze and examine various socio-historical issues. Even today, Weber's influence is unmistakable, as his approaches have affected, directly or indirectly, most historical sociological studies, other than Marxist historical stances, which prioritize historical materialism or economic globalization, and a few selected macro-historical studies (e.g., Gorski 2003; Weiss 1998). Another reason for the importance of comparing these two historical sociologists is the necessity of Weber's historical methods in developing a new idea of world-systems methods. As will be explained below, Weber's historical methods are beneficial because they provide important clues to overcoming methodological limitations of the world-systems analysis.

Despite the importance of this comparison, it is very rare to find any comparative studies of these two methodological approaches due to their epistemological differences within the premise of historical sociology.² Kalberg (2014, p. 98) argued that Wallerstein, in essence, ignores in Weber's methodologies "an orientation to subjective meaning." Hopkins (1982, p. 148), on the other hand, asserted that Weber's emphasis on ideal type is too typological to trace a concept of globally structured capitalism and its changing process over a long historical period.³ A more serious problem stems from a criticism that Weber's typological approach tended to produce fragmented social images without a consideration a universalized and total social phenomenon. According to Weber, all social concepts are only reconstructed through the researchers' individual perception. However, the fictitious social concept formed through the subject value of the researcher often excluded the complicated social relationships or a historicity that are inherent in the original social phenomena. Just as when a beautiful rose was

² Of course, Wallerstein and Weberian scholars like Collins and Mann exchanged views on the future of capitalism (see, Wallerstein, Collins, Mann, Derluigan, and Calhoun 2013).

³ Just as E. P. Thompson (1963) emphasized an historical context in analyzing class relations or A. Giddens (1979) viewed a tradition as a temporal continuity and totality of social relations, Hopkins also prioritizes relationships between parts and the whole and historicity embedded in social concepts.

embossed with on a wood plate, the unengraved parts of the plate, though important attributes of making roses bloom, were overshadowed, many social science researchers have often overshadowed the whole socio-cultural context and historical context (Goldfrank 1979).⁴

As will be discussed later, however, these clearly dissimilar methodologies also share common denominators. In fact, Weber and Wallerstein are both inclined to be interpretatively oriented, rather than prone to law-like generalization in their approaches to history. In this study, Weber's and Wallerstein's methodologies will be compared to find a new methodology of historical sociology like "incorporating dynamics." Specifically, this study will strategically probe two dimensions to compare the historical sociological methods of Weber and Wallerstein. The first dimension is the common ground between Weber's and Wallerstein's historical sociological methodologies. Most historical sociologists, whether consciously or unconsciously, tend to agree that there are great differences between Weber and Wallerstein's methodologies. Breaking from old and parochial ideas, I will disclose the common methodological characteristics of Weber and Wallerstein. These are (1) objections to theorized history, (2) emphasis on materialistic and ideological factors, and (3) a theoretical approach to the social class and an emphasis on a strategic alliance between state and merchants in emerging and developing modern capitalism. The second dimension addresses how Weber's idea complements the weaknesses of existing world-systems methods.

Common Ground in Weber's and Wallerstein's Methodological and Theoretical Practices

There seems to exist no common denominator between Weber's and Wallerstein's historical methodologies. Many researchers may embrace the familiar contrast between Weber and Wallerstein's theoretical approaches and assume that the sociological and historical questions pursued by the two scholars are very different. Yet what is often missing in the assumption is their attitude and perception toward history. As Collins (1980, p. 938) briefly

⁴ It is, in this context, to highlight the difference in comparing the historical methodologies of Weber and Wallerstein. For instance, Weber and Wallerstein differ in their understanding of history. Weber (1949) believed it impossible to understand everything in infinite history, which means that it is critical to identify or explain the properties of the limited scope of historical inquiry, even if immediate, transitory, or ephemeral, while Wallerstein (1974) focused on the macro historical approach, including the historical continuity of capitalism.

noted, "Wallerstein's revision of Marxism is in many ways a movement toward a more Weberian mode of analysis, stressing the importance of external relations among states." I will furthermore add two commonalities that can be found within Weber's and Wallerstein's historical methodology in this chapter.

Oppositions to Theorized History

One commonality of Weber and Wallerstein is that neither theorized history. Weber's historical and sociological approach is open-ended. Weber emphasized empirical validity in historical understanding mainly to prevent any attempt to interpret history within the framework of evolution, a continuum, or a set of rules (Weber [1922] 1982). In the Germany of his time, history was considered—especially in view of historical philosophies and evolutionary interpretation—an entity: living, ethical, and valuable, and which progresses in a certain direction where a series of natural laws can be found. Weber opposed evolutionary interpretations of history, regarding history as valueless (Kalberg 2014, p. 27). Not swept off his feet by the then-dominant mainstream philosophies in his German society, Weber paid attention to the value-added explanations of individual researchers, which would arbitrarily create the meaning thereof. In other words, history by itself was given, and there was no meaning in it as an independent object, but as soon as it was given a certain meaning by individual researchers, it would become a historical component with life and values of its own. According to Weber, history, not by itself or through its own inborn properties but by researchers who created a new form of concepts that provided history with its unique values, would become part of what would be meaningful as well as worth knowing. What matters for Weber is not a raw history presented to everybody or any pattern of rules found therein but historical concepts ascribed to individual researchers.

In this regard, Weber saw the important heuristic values of historical sociology as being established not through a universal law appropriate for all research questions but through interpretations of individual events, which are reflected in researchers' values, because Weber deemed the theorization of history as being as useless as a bottomless vase, unfit to contain researchers' values. That is to say, the theorization of history that has no relationship to the researchers' values cannot observe or interpret the present history, but rather generalizes or determines history, like the law of historical evolution

advocated by some radical Marxists or F. List's linear stages of economic development,⁵ to preclude various interpretations of progressive history that researchers could have produced (Oakes 1998, p. 294).

Theorized history creates a situation in which theorized discourses become very lawlike and objective, making it impossible, according to Weber, to reach new historical interpretations by advocating closed-ended studies of history (Tenburuck 1986). The pressure exerted by theorized, generalized historical theories, such as ontological justification logic, has suffocated individual researchers, as if, Weber cautioned, individuals were swallowed up by formal-rational organizations (e.g., bureaucracy) so that their own historical interpretations and individual values thereof were undervalued or outright ignored.

For this reason, Weber believed that a researcher should project his or her own views into historical events or phenomena to analyze them in a responsible and careful manner, which will engender meaningful results from the study. In this regard, Weber placed more emphasis on cultural beings (*Kultur Mensch*) who could confer "meaning and significance" on social phenomena (Weber 1949, p. 81). An individual researcher's values will be based on the meaningful histories in which historical or sociological studies progress. Weber claimed that science does not give us any advice on our own values, especially in a new epoch "which has eaten of the tree of knowledge" (Weber 1949, p. 57). Thus, researchers' interpolations make up an essential element in the progress of socio-historical studies.

Such a perspective of Weber can be confirmed by another paper. In the article, "Roscher and Knies and the logical problems of Historical

⁵ List developed a productivity theory that focuses on production capacity of a nation (1909, p. 37). Given that the productive power in each society was developed through a certain historical stage of evolution, he suggested a five-step economic development route: "original barbarism, pastoral condition, agricultural condition, agricultural-manufacturing condition, and agricultural-manufacturing-commercial condition" (1909, p. 143). List argued that because the England is the most developed country, other less-developed countries including Germany should not establish economic policies in the same way as the England. In a similar vein, Bruno Hilderbrand argued that economic development of each society has been achieved through a certain step-by-step procedure. Specifically, he insisted that in terms of the degree of exchange of goods, the stages of economic system developed are divided into three: the natural economy (*Naturwirtschaft*), monetary economy (*Geldwirtschaft*), and credit economy (*Kreditwirtschaft*). Influenced by theoretical ideas of F. List, Wilhelm Georg Friedrich Roscher and Karl Knies stressed the historical and organic nature of the national economy. Both emphasized the utility of economics as a tool to promote the wealth of state, and believed that the economic matters, in any way, were closely related to the laws, cultures, ethics, and history of each society (Hennis 1987, pp. 33-34). Gustav Schmoller expressed his interest in Darwinian evolution theory and a universal science.

Economics,” Weber criticized Roscher and Knies’s claim of obtaining objectivity of methodology through the establishment of collective or national agenda setting. Weber argued that “it is obvious that historical reality, including those events and cultural phenomena to which we ascribe the greatest possible ‘epochal’ significance and importance, could never be deduced from those formulas” (Weber 2012, pp. 10-11). For Weber, “an intellectual understanding of the reality” should be reconstructed by individuals’ “inner experience” and their own value-relevance (Weber 2012, p. 11). Thus, history is a subjectivizing discipline” (Weber 2012, p. 48).

Similarly, although not identically, Wallerstein also denied theorized history in the modern world-system. Wallerstein aimed to place the capitalist world-system in world history, while defining the capitalist world-system as a unit of analysis and an object of study. Given that the capitalist world-system is also assumed to be an independent organism with a beginning and an end, for him, the advent of the global systems of capitalism in the context of a long human history is considered as a self-contained history of its own to emerge, develop, and decline. In short, Wallerstein’s modern world-system is a sort of historical system.

To understand this historical capitalist system, Wallerstein called it a perspective or analysis rather than a theory because the modern world-system shows historical properties and world-systems analysis cannot produce generalized historical rules or propositions (Tomich 2016, p. 16). Wallerstein thought that his methodology merely provided clues for interpreting the history of capitalism, while avoiding a reification that concepts or theories judge and overwhelm historical reality (Wallerstein 2012, p. 9).

Furthermore, under the assumption that it is difficult to present a theory of a single static world-system, Wallerstein proposed the “world-systems.” Here, the idea of the world-systems is qualitatively different from the “world system” suggested by Gunder Frank. Frank used the world system to encompass “all of historical time and space” (Wallerstein 1991, p. 191), on the contrary, Wallerstein provided plural world systems that have appeared in human history; and the modern world-system (i.e., the capitalist world-system), considered as one of these world systems, emerged after the sixteenth century. Such an idea by Wallerstein about the modern world-system therefore is strongly wary of a unified theoretical narrative or teleological implication. In sum, although Weber and Wallerstein denied theorized history for different reasons, both their views on history aimed at making not a universal theory but an interpretative and analytical logic.

Emphasis on Materialism and Ideologies

Socio-historical events are a mixture of materials and ideals, according to Weber, so neither materialism, which focuses exclusively on materialistic relations, nor idealism, which focuses exclusively on ideals, was his basic position for analyzing socio-historical studies. Weber recognized material interests as an important principle with which to analyze social actions, which are appropriate for economic motives, or a historical phenomenon, which is suitable for a society's material conditions (Swedberg 2004). But he drew the line at seeing material interests as a part of the whole picture. According to Weber, ideals are as important as material interests in analyzing social change and determining a society's socio-economic conditions, so ideals are necessary to fill in the blanks of the whole picture: "Not ideas, but material and ideal interests, directly govern men's conduct. Yet very frequently the 'world images' that have been created by 'ideas' have, like switchmen (*Weichensteller*), determined the tracks along which action has been pushed by the dynamic of interest" (Weber 1958, p. 280).

Weber believed that materialistic concepts were meaningless without ideals, and ideals pointless without materialistic concepts. Dealing with both materialism and idealism, Weber expected to establish a solid preliminary investigation and attain a meaningful result from socio-historical studies (Weber 1988, p. 252). This shows the importance of the complex relationships between materialism and idealism in sociological studies.

Weber's claim appears evident in his study of *The Protestant Ethic and the Spirit of Capitalism*. Puritans were able to bypass priests, once regarded as mediators of or vehicles for salvation, by installing direct access to God. This obviously led to the liberation of individuals and a gateway to individual freedom, but at the same time, such individuals were now compelled to confront the question of salvation and whether they had been redeemed by God, as no one could answer for them. This led Puritans to seek extreme measures, such as self-alienation, resulting in extremes of self-discipline. Economic success (or an accumulation of wealth) was not their initial goal, but they began to view it as evidence of their salvation (Weber 1976). As a result, they maintained strong and passionate tension and confrontation with the material world (*gewaltige und pathetische Spannung gegenüber der Welt*), which resulted, as Weber noted, in secular values of capitalism, such as frugality, advanced rationale, and calculative economic reasoning, including in the sense of "preferring long-term, low-risk predictability over quick, high-

risk gain” (Lizardo and Stoltz 2018, p. 16).

Given that Puritans’ dedication to achieving an austere life and economic prosperity led to the progress of Western capitalism, Weber’s study shows how ideals (i.e., the Puritan ethos) and material interests (i.e., the material wealth of Puritan society) connected to each other in the early years of Western capitalism.

Like Weber, who valued the interaction between ideals and interests, Wallerstein was also interested in the interaction between the two. Few deny the fact that Wallerstein’s argument on historical capitalism is quintessentially material-based and highlights the influence of self-contained capitalism on each society; therefore, many are inclined to view him as a historical materialist. This conclusion is not entirely wrong, but in the fourth volume of *The Modern World-System*, Wallerstein analyzes the theoretical structures at work within the modern world-system.

More specifically, Wallerstein pointed to the rise of centrist liberalism as an underlying force that molded the long nineteenth century (1789–1911). The so-called “centrist liberalism,” positioned between right-wing conservatism and left-wing liberalism, had been the very core value of the long nineteenth century capitalist world-economy as it grew in Great Britain, France, and Belgium. Wallerstein analyzed how centrist liberalism claimed ideological hegemony (i.e., geoculture) over other ideologies (e.g., conservatism, socialism) during the long nineteenth century, and as a result of this, how liberal citizens had been created under the guidance of liberal states, how the British and French governments advocated liberal ideology, how Britain’s “liberal interventionism” accelerated to develop its free trade imperialism, how the triumph of liberalism served to develop a Eurocentric perspective—“the concept of West ... was militarily strong and economically dominant,” while the concept of East was “unfree” and “economically backward” (Wallerstein 2011, p. 69)—and how liberal ideology affected the rise of nomothetic, scientific, and value-neutral ideas in the social sciences.⁶ This led to the understanding of how the basic structures (materialistic interests) of the world-system are related to its superstructures (ideals).

⁶ For instance, Wallerstein (2011, p. 235) argued that the expansion of liberalism in social science promoted the spread of value-neutral attitude which was distinguished from the dominant idea of the historical school of economics—prioritizing relationships between national economy and legal, cultural, and social history provided by Wilhelm Roscher, Bruno Hildebrand and Karl Knies.

As For the Rest: An Idea to the Social Class and a Strategic Alliance between State and Merchants

Additional commonalities in Wallerstein's and Weber's research can also be found. These are theoretical approaches to the social class and an emphasis on a strategic alliance between state and merchants in emerging and developing modern capitalism.

First, regarding social class, Weber defines a class situation as external conditions structured through economic order that affected either directly or indirectly the market position and life opportunities of each class member; nonetheless, Weber believed that a change from one class status to another is possible (Weber 1978, p. 302). Also, depending on the social structural context, class antagonism can cause revolutionary conflicts, but at the same time, coexistence without any bloody conflicts is possible (Weber 1978, p. 303). It refers to changeability of class status and diversity of class relations within a larger socio-economic context. His approach to social class and class situations is similar to those of Wallerstein.

According to Wallerstein (1979), the social class conception is not invariable. Nor is a new social class formed by internal dynamics entirely. Wallerstein presented a changeable and evolving class conception in the context of particular moments of time, particular places, and the conditions of development of the capitalist world-economy. Hopkins (1977, p. 68) echoed this point and noted that "the theoretical conditions and processes of 'class-formation' are themselves continually transformed in the course of capitalist development." Hence, "the bourgeoisie is not a static phenomenon" (Wallerstein 1979, p. 286) and conceptions of the proletariat cannot be eternal or fixed. Such an idea of class that was shared (or partially influenced by) across Marx and Marxist historians (e.g., Marx [1933]1990 and Thompson 1963) was often used to combine historical context with the class of the capitalist mode of production. Just as they considered social and economic class as historical constructions and the result of the social-historical process and relationship, in particular because of its flexible capability, Wallerstein (1975) also stressed a class formation over a long period of time and foregrounded an organization of human relationships that could be changed in the context of historical time and the dynamics of transnational entity. In Wallerstein's analysis, "a variety of different mechanisms of labor control is possible and used in capitalism, ranging from slavery and indentured servants to free labor," (Lippit 2005, p. 115) as long as

laborers were formulated and reformulated within the globalized capitalist system.⁷ Not only are laborers formed by the dynamics of the historical capitalism, but the bourgeoisie also perforce emerged within the logics of the world-economy, according to Wallerstein.

Second, Weber and Wallerstein paid keen attention to a strategic alliance between state and merchants in emerging and developing modern capitalism. For instance, to exploit the resources of the extra-European area, each nation state of Europe had to be closely tied with merchants who took the initiative in the overseas expansion. Weber (1978, pp. 353-354) argued that a “memorable alliance between the rising states and the sought-after and privileged capitalist powers was a major factor in creating modern capitalism” and it, from that moment, brought about “European competitive struggle between large, approximately equal and purely political structures which has had such a global impact.” As Weber pointed out that the combination of state and merchants created a decisive moment for the birth of modern capitalism, Wallerstein also emphasized the importance of this as follows: “no doubt overseas expansion has been traditionally linked with the interests of merchants, who stood to profit by the expanded trade, and with the monarchs who sought to ensure both glory and revenue for the throne” (Wallerstein 1974a, p. 47). Specifically, the success of long-distance sea trade led by Portugal spurred other European countries to foster “coherent nation-states obtaining politico-commercial advantages” (Wallerstein 1974a, p. 265) through the sea routes. It furthermore served as a starting point for opening a new era of Europe-led capitalist world-system.

How Weber's Historical Methods are Beneficial to Wallerstein and Existing World-Systems Methods: Aiming at Developing an Idea of Incorporating Dynamics

This study has compared Weber's and Wallerstein's historical methodologies to refute that they have irreconcilable differences originating from epistemological and methodological incompatibilities. In the previous chapter, I have shown commonality between Weber's and Wallerstein's historical studies. Taking matters one step further, I seek to find a new approach such as an idea of incorporating dynamics. It may be possible to take some advantage of advancing the world-systems methodological

⁷ With regard to a wide range of modes of labor provided by Immanuel Wallerstein, see also El-Ojeili 2014.

perspective.

The Approaches of Wallerstein and McMichael and Their Methodological Limitations

Within the field of historical sociology, Weber's main theme is to examine a question of how modernization and capitalism in the Western world grew more rapidly than in non-Western worlds. To delve into this question, Weber used the comparison method.⁸ Specifically, to explain the modernization and capitalism emerged in the West, Weber suggested an ideal type of the development path of Western civilization; on the contrary, to analyze the delay (or non-occurrence) in the transition to capitalism or underdevelopment of non-Western regions, he also offered an ideal type of the development path of non-Western civilization. After that, by contrasting the ideal types of Western civilization and non-Western civilization, he was able to identify the qualitative differences between Western and non-Western societies and find distinctive characteristics of Western capitalism and modernization.

Unlike Weber's approach which distinguished the difference between the Western and the non-Western civilization (or society), Wallerstein questions the comparison method at the national (or civilizational) level. Comparative historical researchers including Weber often consider a state (or society) as a self-evident and discrete social unit, and thus, they believed, the state (or society) can be compared to others. Such a cross-national comparisons, however, are criticized because to make them is "to reify parts of the totality into such units and then to compare these reified structures" (Wallerstein 1974b, p. 388; see also Wallerstein 2004). Cross national comparisons transform a historical and dynamic society (or state) into an ahistorical structure and unchanged society (or state). In contrast, Wallerstein contended that "social change can only be understood as an historical system that operates at a different level from the conventional national society" (McMichael 1990, pp. 385–386). Unlike cross-national comparisons that "place nations within systemic processes operating at levels 'beneath' and 'above' the nation state" (Wallerstein 1974b, p. 390), Wallerstein proposed the modern world-system, with its "trans-societal structures," that has existed for the last five centuries (McMichael 1990, p. 386). World-systems do not

⁸ Comparison methods have been used widely by historical sociologists including Max Weber. As Ru (2019: 236) pointed out, Weber used "comparison through self-generative disparity" to show a dichotomous comparison between the West and the non-West.

consider a state (or society) as a “universal” and “discrete” category. Rather, a state (or society) is structured and restructured in the development processes of the world-systems (Hopkins and Wallerstein 1981). Wallerstein's analysis is compelled to move away from any assumption of a self-regulating nation-state and toward a description of the process of continual change for nation states within the larger canvas of the world-economy. The world-systems perspective's maneuver has successfully challenged exclusive state-based comparisons propagated by past comparative historical sociologists and it also brings in outside influence and the relational processes between the world-economy and states (Ru 2019, p. 242).

Although Wallerstein's new approach was path-breaking, his idea faces some methodological criticism. First, Wallerstein, engrossed in examining the dynamics of the modern world-system itself—such as its origins and evolution, the conflicts between core countries within it, or the relationships between cores and peripherals—was not particularly interested in the peripheral influence on cores. On this, Eric Wolf (1982), John R. Hall (1984), Marshall Sahlins (1988), and Thomas D. Hall (2012) have been concerned about Wallerstein's perspective stemming from the subjugation of peripheries by core states without historical narratives of the reactions of the peripheries (or “micro-populations”). Second, Neil Brenner believed that Wallerstein fell into a trap of methodological territorialism, even though he presented a transnational conceptualization of spatial dynamics stemming from the dynamics of the capitalist world-system: “For Wallerstein, the economic division of labor is intrinsically composed of state; capitalist enterprises are in turn said to be ‘domiciled’ within their associated national state structure” (Brenner 1999, p. 58). It is criticized for identifying space as a static and fixed entity by structuralized state-centric world-systems perspective. This perception of space thus may result in ignoring aspects of space as “reconstitution or transformation of the social and political space” (Brenner 1999, p. 58). These criticisms are due mainly to Wallerstein's overemphasis on a transnational but abstract unit of analysis. For the same reason (i.e., his functional and holistic view on the capitalist world-economy), Wallerstein's idea on the modern world-system has received constant negative criticism (e.g., Anievas and Nişancıoğlu, 2017; Aronowitz, 1981; Foster-Carter, 1978; Kimmel, 1982; Skocpol, 1977; Washbrook, 1990).

As an alternative to the totalitarian or functional problems of Wallerstein's methodology, Philip McMichael (1990) provided the method of “incorporating comparison.” Wallerstein assumed the modern world-system to be a sort of a priori conception, paying attention to its self-determined

properties and overlooking the role of the parts (i.e., the components of the whole) that constitute it. Because the modern world-system (i.e., the whole) cannot exist by itself without being connected to its various parts, and because Wallerstein's obsession with the dynamics of the modern world-system led him to ignore the role of its parts, McMichael asserted that it was necessary to further investigate the connections between the parts of the modern world-system and the modern world-system itself.⁹ McMichael's assertion is important because it enables us to recognize how these dynamic connections led to historical changes in the modern world-system (McMichael 2000). McMichael also claimed that the role of the parts was important even at the beginning stage of the modern world-system, which shows that the modern world-system is not an a priori conception but rather a historical component.

McMichael's incorporating comparison method helps us escape Wallerstein's functional and totalitarian trap, to some extent. However, he does not provide a full answer to the question of how parts are connected in different ways under the influence of the modern world-system. In other words, world-system methodologies have been defined by the dynamics of the whole (Wallerstein's idea) or by the relationships between the parts and the whole (McMichael's idea), while largely ignoring various relationships among the parts within the whole. Influenced by Karel Kosik's (1976, p. 22) idea of a dialectical conception of totality—that “the parts not only internally interact and interconnect both among themselves and with the whole, but also that the whole cannot be petrified in an abstraction superior to the facts”—McMichael pointed out that parts “reveal and realize the changing whole” (1990, p. 391). Nonetheless, his method of incorporating comparison emphasizes the part-whole relationships without specific explanations of the dynamics that are formed in the relationship of the parts.¹⁰

⁹ According to the world-systems analysis, the whole refers to the logics of capitalist world-economy like the international division of labor system, the hierarchical relationships of the interstate system (e.g., unilateral transfers of labor and capital between core and periphery), and transnational commodity and capital network. However, unlike Wallerstein's idea of the whole, McMichael argued that the whole refers to “a conceptual procedure, rather than an empirical or conceptual premise” (McMichael 1990, p. 391) and thus “the whole emerges through the action of its parts” (McMichael 1990, p. 394). On the contrary, there are different levels and forms of parts that are the constituent elements of the whole. For instance, there are relatively large parts like (modern) states, and relatively small parts like cities or regions.

¹⁰ As such, it posed no methodological idea for the multiple forms of inter-part relationships, which is evidenced in how it follows a prominent world-systems researcher's choice of research design. Influenced by Antonio Gramsci's idea of hegemony at the national level, Marx's idea of

As an alternative to McMichael's method, the next chapter examines incorporating dynamics. After that, by pointing out the affinities between incorporating dynamics and Max Weber's methodology, I will discuss how his methodology can be effectively used in advancing world-systems methods. Yet, I make sure that although I introduced the incorporating dynamics to close existing logical loopholes of world-systems methods, it does not mean that the methodological idea of incorporating dynamics is superior to others. Rather, only by combining Wallerstein's and McMichael's approaches with the incorporating dynamics, may we be able to maximize the methodological advantages of the world-systems method.

Calling for Incorporating Dynamics and Effectiveness of Weber's Method

As noted in preceding chapter, McMichael's idea had fatal flaws as well as methodological advantages. To make up for McMichael's incorporating comparison method, which puts more emphasis on the relationships between parts and the whole, Ru (2021) suggested an idea of inter-part relationships suggested by "incorporating dynamics." Assuming that "in a system, it is the connections between the parts that must be studied" (Abu-Lughod 1989, p. 368), incorporating dynamics refers to a methodological strategy to identify relationships among parts and to trace the formation and reformation processes of the various inter-part relationships, thereby analyzing the roles of inter-part relations connected to the whole. In addition, incorporating dynamics aims to show how inter-part relationships interact with the whole and affect the logics and dynamics of the whole.

Why do inter-part relations matter? Using inter-part relationships is significant because they operate as capillaries of the part-whole relationships.¹¹

capital accumulation, and Philip McMichael's idea of incorporating comparison, Arrighi ([1994] 2010) presented an inseparable relation between the territorial logic of power and the capitalist within the capitalist world economy. This resulted in emphasizing the expansion of territorialism-based capitalism and hegemonic transition that were played out in the capital accumulation process (C-M: material accumulation, M-C: financial accumulation) and political capacities (e.g., leadership and governance) (Arrighi & Silver, 1999, p. 22). However, Arrighi's research ultimately engaged in methodological territorialism, which insisted on a single unit of analysis of the state (including the city-state). If I may borrow the rhetoric of physics, Arrighi reduced the state to an atomic unit that could no longer be divided. Unlike Arrighi's methodological territorialism, Itzigsohn (2001) pointed out that the dynamics of units that are physically smaller than the state, such as a region or a local place, can also be related to the logics of the capitalist world-system: "Global processes are mediated by institutional structures at the local level" (p. 442). This informs us of the fact that the part in a part-whole relationship is not a single fixed unit (i.e., the state) but rather consists of multiple forms.

¹¹ According to Tilly (1984, p. 83-84), Wallerstein's world-systems analysis used both

Parts in the whole form various relationships. Moreover, inter-part relationships influence the dynamics of the capitalist world-economy. After the discovery of the Americas, for example, silver mines in the New World became functionally interconnected with a global production-distribution network. As a result, the size of the Europe-led capitalist world-economy expanded further. As Smith (2007, pp. 161-162) explicitly noted, the discovery of America influenced the development of agriculture and manufacture systems in England, Netherlands, Germany, Sweden, Denmark, and Russia. Furthermore, as the silver market in America emerged and advanced, Europe's ocean-going business also expanded. In fact, European traders gained enormous wealth through the silver trade with China, which consumed enormous amounts of silver (Stein and Stein 2000). It consequently paved the way for the expansion of the capitalist world-economy. In sum, inter-part relationships at least partially influence the whole in that the connection of inter-parts (e.g., the connections between silver mines in America and European merchants) led to the expansion of the capitalist world-system.

Assuming that more concrete historical narratives of parts and more explicit pictures of part-whole relationships can be confirmed by looking into the inter-part relationship, Max Weber's methodology is effective because, as a "situational analysis" (Roth and Schluchter 1979, p. 195), it enables detailed historical narratives of individual events, the relationships between individual cases, and the connection of individual events to larger social contexts. In fact, Weber's ideal type enables us to categorize inter-part connections and create thick descriptions of each inter-part connection, allowing for further detail in how each inter-part connection interacts with the modern world-system in various ways through a categorized approach. Weber's approach of viewing the relationships between parts as a single event and interpreting this event by solving each relationship individually allows researchers to discover new types of dynamics and examine how the relationships between parts can relate to the whole. The emphasis on inter-part relationships in this context is aimed at analyzing how the relations of the parts are connected to the logics

"individualizing" and "encompassing" comparisons; however, to show more detailed and specific encompassing comparisons of Wallerstein's world-systems analysis, an idea of the inter-part relationships is essential. As Tilly rightly pointed out, Wallerstein's encompassing" comparison tended to focus merely on the single function or role of core, semi-periphery, and peripheral parts that were operated through the relationships with the whole. However, the various relationships between parts cannot be explained only by the unified criteria of core, semi-peripheral, and peripheral condition. As will be discussed later, inter-part relations are sometimes organically connected, or conversely have disconnected each other. Indeed, parts coexisted at the same time-space without any connection.

of the whole (i.e., the capitalist world-economy). With that in mind, the idea of a functionalist explanation about the whole is regarded as a heuristic device. I do not refer to the transnational entity of the capitalist world-system in a contemptuous way. In opposition to a self-fulfilling or independent transnational entity that was entirely separated from the parts, I stress the ontological reality of a transnational entity confirmed at least partially by the inter-part relationships.

Furthermore, as Weber pointed out, historical examples of various forms of inter-part relationships can be treated as a historically constituted ideal type.¹² The historically constituted ideal type used by Weber is an ideal type as a function for developmental historical explanations (*Idealtypus in seiner Funktion für die genetische Erklärung*) (Oh 1997, p. 183). Weber put historical events which were reconstructed by ideal type in the stream of time and traced how those historical events can be changed over time. For instance, Weber analyzed how the socio-cultural value of Protestant ethics changes in the development of capitalism: the Protestant ethic is the desperate inner motivation of Protestants which, in turn, developed a mechanism of capitalism in the early days, but in the mature period of capitalism, it rather brings about the unintended consequences that could create a proverbial iron cage, which led to the loss of humanity and an obstacle to the development of a capitalist system. Just as Weber used the historically constructed ideal type as an epistemological tool, we may use it for understanding various complicated historical situations within the capitalist world-economy.¹³ As

¹² Of course, a complete idea of Max Weber's idea type logically involves accounts of "sociological version of the ideal type" (Swedberg 2017, p. 182) that stressed generality and causal-adequacy. In his early writing, "The objectivity of knowledge in social science and social policy," Weber set out on historical type of analysis prioritizing values of individual phenomenon and researcher's value-relevance in formulating ideal type; whereas, in his later work, *Economy and Society*, he was much more concerned with sociological analysis emphasizing generality, abstractness, sociological concepts in formulating his ideal type. Regarding the two different versions of the ideal type, Swedberg (2017) speculated that Weber's understanding and interest in the ideal type may have been transitioned from a history- and individual case-oriented explanation to a sociology and an empirical generalization contained in sociological concepts. Lindbekk (1992, p. 295) in a similar vein argued that Weber's interest in ideal type, which may reasonably be seen in his book *Economy and Society*, is "more forceful methodology." Few deny that in analyzing Max Weber's social theory and methodology, the book, *Economy and Society*, is essential; nonetheless, the overemphasis on this one text in Weber's entire oeuvre tends to unify various aspects of Weber's sociological ideas and methodologies into one. At least in the field of historical sociology, I believe we take much more heed of Weber's narratives of ideal types in his early work because Weber, based on ideal type as an analytical tool, discussed how historical entities had been combined with sociological explanations.

¹³ Of course, Weber's ideal type may not be easily mixed with the world-systems methods which prioritized the overlap of temporality within a historical capitalism: a) it can be difficult to

another example of this, Prasenjit Duara (2003) identified how the logics of the transnational entity (e.g., the logics of the interstate system) are embedded in establishing and operating the empire of Manchuria as a puppet state of the Japanese empire, and how the relationships between the empire of Manchuria and its neighboring countries were historically developed within this transnational entity. Duara's analysis viewed the complicated history of the empire of Manchuria as an ideal type, providing a thick description of the inter-part relationships and how these are connected to the logics of the whole. It may have the advantage of providing world-system scholars with a "theoretical history"—an optimal conjuncture between history and theory in the Marxian tradition.¹⁴

Second, when we borrow Weber's historical method, we may observe that the connections of the components in the capitalist world-economy that seemed inevitable and goal-oriented are sometimes made by chance. In other words, historical examples show that the relations of parts connected with the logics of the capitalist world-economy can be formed by contingent events. As an example, we may compare the long-distance silver trade between China and Europe between the 1500s and the 1750s with the opium trade after the 1750s. The initial connection between the capitalist world-economy and the Ming government was formed by international commercial trade. As one of the exogenous forces that led to China's integration into the world-economy, China's silver trade was significant. After establishing a silver standard for tax payments in the Ming government, silver became a necessary currency for paying taxes. Nevertheless, due to the lack of silver deposits, the Ming and Qing governments had to import massive amounts of silver through international trade; from 1500 to 1800, China became one of the

encompass the different temporalities such as long or short-term duration/rhythm of capitalist world-system with only an ideal type, and b) it is difficult to analyze the emergence of different global hegemonies within the capitalist world-system or the rise and decline of global hegemony with merely abstract ideal types. However, as discussed in this study, the important point is that Weber's ideal type used in at least historical sociology is a) not an ideal type that exists regardless of historical time, and b) the existence of complex and diverse time periods can be explained with multiple ideal types; however, c) these do not omit the complex relationships between individual events occurring in various time zones. Given that, it can be said that Weber's ideal types has an affinity with world-systems methods.

¹⁴ According to Tomich (2004), theoretical history is important in that it "enables us to reconstruct the historically formed world division of labour as a relation among specific material processes and social forms of labour in particular places, integrated by the world market, changing with regard to one another over time and in space" (p. 30). From the perspective of such a unified analytical field, called a "totality," we can construct and reconstruct the dynamics of parts, the inter-part relationships, and the part-whole relationships.

main end markets for world silver (Flynn and Giráldez 2002). It may very well be that the Chinese government could hardly be free from the vicissitudes of international silver value. Given that vicissitudinous silver trade was one of the major commodities in the world economic system and that silver was circulated globally, it came as no surprise that the value of silver could not be controlled by the Chinese government. However, it was not the silver trade that led to China's incorporation into the capitalist world-economy. Rather, the incorporation of China began through an unexpected international trade: Britain's opium trade (Moulder 1977; Ru 2020).

Why did Britain suddenly export (Indian) opium to China? It was germane to a sharp increase in (Chinese) tea consumption. Since the eighteenth century, both upper and working classes began to enjoy Chinese tea (Mintz 1995; Ward 1994). Driven mainly by Britain's pursuit of the tea trade with China, massive amounts of silver entered China in the eighteenth century. The growth of the tea-silver trade contributed to China's fiscal stability for the first time. It so happened that it was difficult for European countries (including Britain) to import silver from other continents in nineteenth century because of Mexico's independence from Spanish rule, the economic slowdown of the European world-economy, Britain's silver shortage (Hung 2001), and the global decline in the silver supply in early nineteenth century (Lin 2006). Given that "Europe had been buying tea in China since the early eighteenth century but found no acceptable payment other than silver" (Wallerstein 1989, p. 167), the growth of tea consumption in Britain exceeded the silver outflow. To stop the silver outflow from Britain, the British government needed a major breakthrough. One of Britain's subsequent actions was exporting Indian opium to China in return for tea (this was called a "triangular trade"). For China, the silver trade, which had been going on for hundreds of years, was the more desperate and necessary international trade than importing opium; nonetheless, China's incorporation process occurred with unexpected high demand of Chinese tea in Britain and the export of Indian opium since the late eighteenth century. Just as Jack A. Goldstone (1991) emphasized on the contingent factors in examining England's rapid takeoff after the nineteenth century, the beginning of China's incorporation process was touched off by unprepared and adventitious historical events of China's tea export and British India's opium import. In analyzing how an unexpected historical event began China's incorporation process, therefore, increasing attention to contingent factors provides important clues in interpreting the following question of how parts within the capitalist world-economy have generated their own unexpected dynamics.¹⁵

By the same token, Weber emphasized the contingency of historical events. Weber (1958, p. 280) believed that the affinities between ideas and material interests help interpret the occurrence of contingent events. Weber's theory on labor practices in his work, *The Protestant Ethic and the Spirit of Capitalism*, basically refers to a rationalized, routinized, and calculated form of laborer who believed in Puritanism. In some modern Western societies, Puritans had a strong propensity for working hard in this world because they believed that no one could confirm their salvation in the afterlife; thus, only hard work in this world would be considered to be a sign of salvation. Weber (1976, p. 181) argued that "the Puritan wanted to work in a calling; we are forced to do so." He pointed out that there was an elective affinity between ideas (i.e., Puritan ethics) and interests (i.e., the Puritans' rational economic activities). Furthermore, Weber believed that this affinity coincidentally helped the development of industrial capitalism in the West. To quote Goldstone (2002, p. 330), "different mixings of institutions, beliefs, and contingent events created significant local and regional variation on major themes." Interest in the contingency of historical events may also help in identifying the contingency that is embedded in the dynamics of parts or in the inter-part relationships.

Third, just as capital or power formed in a social relationship is not fixed in one form but can be transformed according to changes in social structures or historical context (Bourdieu 1984; Giddens 1979), parts combined with dynamics of the whole can also be changed into various forms according to the combination of inter-part relationships. For instance, when China was incorporated into the capitalist world-economy, we may trace changes in social status or the roles of one class. Prior to the 1840s, the role and authority of compradors were extremely limited. Compradors who spoke foreign languages and learned Western management skills were in charge of the connections between Western merchants and Chinese merchants after the establishment of the Cohong system in 1760. During the Cohong system period (1760–1839), the government-controlled trading system constrained their authority. As China opened up to foreign trade and began to become incorporated into the world-economy after the 1840s, however, their role

¹⁵ In fact, many world-systems researchers (e.g., Basu 1979; Molder 1977; Ru 2020; So 1984; So and Chiu 1995) who analyzed China's incorporation process into the capitalist world-system have tended to regard it an historical event that had to happen as if it were a causation in history. Accordingly, they have a strong tendency to emphasize on the inevitability of historical events as though all the events that occurred in the China's incorporation are either directly or indirectly intertwined in causal relations with the working principle of the capitalist world-system.

grew, and some of them emerged as major international merchants. As Hao (1970) noted, the comprador was “among the first in modern China to stress the importance of commercial and industrial advances as opposed to military development and the Confucian social order” (p. 456). Western companies, especially those in the banking industry and steam navigation companies, were dedicated to finding and hiring Chinese compradors to help link the indigenous trade network with the world-economy (Cochran 2000; Dernberger, 1975; Xu 2008). Chinese compradors served to reduce errors in interpretation and translation, notarizing important transaction documents and helping Western merchants use unfamiliar Chinese currency and understand Chinese market conditions or business-related customs that related to their own businesses. The increasing demand for compradors would, in turn, lead to an increase in their numbers by the late nineteenth century (Hui 1995). In China alone, “there were roughly 700 compradors in 1870, and as many as 20,000 in 1900” (Osterhammel 2009, p. 769).

After the rise of the compradors, Western merchants snugly ensconced themselves in the Chinese market. Nonetheless, characterizing compradors as the *nouveau riche* is inappropriate. They did not have what Thorstein Veblen called “conspicuous consumption” in their lifestyle and did not pursue profligate spending. Their deft command of the foreign language, excellent accounting skills, and assiduousness in their accumulation of wealth could be a stepping stone for turning themselves into new and independent industrial or bank capitalists. As a matter of fact, some compradors accumulated wealth and played an important role in developing Shanghai’s banking business from the 1840s to the 1900s (Ji 2003). Others, like Xu Run, Tang Jingxing (Tong King-sing), Zheng Guanying, and later Yu Qiaqing, gained upper-class status through their own wealth. In significant contrast to members of the gentry or the eight banners, who depended heavily on the ruling system of the Qing regime, compradors depended heavily on private, trust-based, and market-oriented relations that valued the right to make themselves independent and self-disciplined capitalists.¹⁶ The change in the role of Chinese compradors, in connection with China’s incorporation process, allows us to know how their power resources have shifted from “cultural capital” (i.e., foreign language capacity) to “economic capital” (i.e., commercial or industrial capital) over a short period of time.

¹⁶ Of course, it was the socio-economic and cultural logics of modern world-system, which prepared for the ground for the rise of Chinese compradors.

TABLE 1
COMPARISON OF THE THREE MAJOR WORLD-SYSTEMS METHODOLOGIES AND
USEFULNESS OF WEBER'S METHODOLOGY

| | World-Systems Analysis | Incorporating Comparison | Incorporating Dynamics | Weber's Methods can be utilized in Incorporating Dynamics |
|------------------------------|---|--|---|--|
| Main Aims | Tracing long-term, large-scale social change of the past, present, and future | Adding the role of parts that enables the dynamism of the capitalist world-system | Seeking to various models formed in the relationships between parts | Complementing Incorporating Dynamics method |
| Method | Considering the capitalist world-system as a "complex, structured, and historical whole" (Lee and Dale, 2016: 8) | The part-whole relations | Inter-part relations | - situational analysis - historically constituted ideal type |
| Methodological advantages | Historicizing and locating the state(s) in the context of dynamics of the capitalist world-system. (e.g., the roles of state in the context of the international division of labor system or globalized commodity chains) | Explaining how the capitalist world-system can exist in a single entity and develop as self-fulfilling form | Discovering the dynamics that take place in the relationships between parts | - Presenting situational analysis that makes it possible to interpret individual events, the connection between individual events, and the relationship between individual events in a larger context - Presenting a historically constituted ideal type that encompasses complex historical events that have emerged in various time periods or in each time period - Identifying the contingent elements of historical events - Grasping parts that change within a historical context of a larger socio-economic context |
| Methodological disadvantages | Inattention to the role or function of the various types of parts that make capitalist world-system dynamic | Due mainly to emphasize on the relationships between parts and the whole, it tends to ignore various types of inter-part relationships | - | - |

In tracing and interpreting the transposition or transformation of inter-part relationships, Weber's ideal type model is helpful. The ideal type is an abstract construct and "the highest possible degree of logical integration" (Weber 1968, p. 20) to recognize social phenomenon or socio-historical events, which basically aimed to explain individual phenomena. Although this ideal type is an abstract concept that exists separate from concrete reality, it is used as a methodological means (*Mittel*) for researchers to analyze social-historical reality (Weber ([1922] 1982, p. 193). Because the ideal type is a methodological or heuristic tool, it possesses no unique properties and does not constitute a criterion of value judgment (Weber [1922] 1982, p. 195). As Weber pointed out, the ideal type is not a Procrustean bed (*Prokrustesbett*) fitting into any historical-social phenomenon, nor is it any methodological attempt to fix historical reality (Weber [1922] 1982, p. 195). That is, ideal types exist in the form of perception as a means to understand historical or real events, which do not represent the general characteristics of the targets to be analyzed. Rather, they would, in Weber's statements, draw out the fundamental values from the analyzed target and juxtapose them with sociological events to interpret (Weber [1922] 1982, p. 202). Weber's concept of the ideal type enables us to comprehend a situation in which a socio-historical event changes qualitatively in a social network as well as a variety of social realities. In other words, the ideal type can be conceptualized as capable of interpreting the changing situations of a same social reality. Weber's methodological perspective, in this sense, allows us to interpret a variety of detailed and complicated historical narratives regarding the dynamics of parts. Furthermore, it presents an important epistemological setting for world-systems researchers who attempt to analyze multiple types of inter-part relationships and part-whole relationships.

Weber's and Wallerstein's historical methodologies are two sides of the same coin that have evolved into different types of methodologies. We cannot see the whole picture with only one side of the coin, and, just as checking both sides of the coin is necessary to understand the entire picture, each of Weber's and Wallerstein's methodologies, if used correctly, will aid in the progress of historical sociology studies.

Summary and Discussion

In this study, I analyzed Max Weber's and Wallerstein's historical methods and compared epistemological views of the two scholars. So far, it has been

interpreted that there is no similarity between Weber's and Wallerstein's historical methods. Unlike previous studies, I have presented the commonalities that can be found in the historical methodology between the two scholars and how Weber's methodological ideas can help make up for the weaknesses (or strengthen the advantages) of world-systems methods.

As a significant contribution of this study, this paper, by using Weber's perspective, showed how we develop the world-systems perspective. In contrast to existing historical methods in social science, the unique and new perspective of the modern world-system stems from the interest of the transnational political-economic system. According to Wallerstein's view of the modern world-system, it appeared at the end of the fifteenth century or early sixteenth century in Europe. Indeed, from the beginning, the modern world-system has been characterized as a transnational entity and has been expanded and reformulated its size in proportion to the deterritorializing and reterritorializing logics of capitalism. In addition, it has an intrinsic, repetitive, and global economic cycles, which is different from that of nation-state. Just as Mark Twain's intriguing comment that "history does not repeat itself, but it does rhyme," Wallerstein also believed there are inherently repeatable social or economic cycles within the capitalist world-economy. A holistic point of view, however, embedded in the world-systems analysis is one of the most notorious problems world-systems scholars face these days. Excessive emphasis on the existence of such a transnational entity and its operating logics inadvertently resulted in omitting the dynamics of the sub-elements of the modern world-system. To overcome the weakness of Wallerstein's holistic view, post-Wallerstein world-systems theorists (e.g., McMichael) have shown interest in the part-whole relationship. By presenting "incorporating comparison," McMichael enshrines the relationships between the parts and the whole. It obviously helped to deemphasize a holistic and functional view of Wallerstein's idea given that it partially highlights the roles of the parts in the whole. Although the part-whole relationships presented by "incorporating comparison" provide world-systems scholars with breathing room for interpreting the dynamics of the parts, this alone was not sufficient. This is because the McMichael's idea of "incorporating comparison" has paid relatively scant attention to inter-part relations. For that reason, I suggested "incorporating dynamics" (Ru 2021), highlighting inter-part relations.

To identify and develop inter-part relationships in the world-systems analysis, I here borrowed Weber's historical method. Weber's interest in individual historical cases (or events), categorical approach based on ideal

type, contingent events, and changeability of social phenomenon or historical events combined with a larger social context may be an important asset in using multiple types of inter-part relationships. It may lead world-systems researchers to take a profound interest in the unit of analysis of inter-part relationships. The more we consider a fundamental assumption of historical sociology—rather than viewing a historical event as a fixed or given social fact, it is more concerned with the social relationship and context that created it—and the more seriously we consider the intersection of the historical methods between Weber and Wallerstein, the more likely that historical sociologists will have a new epistemological tool. This consequently also help us to close a gap between theoretical lens and empirical and historical reality.

Nonetheless, I again clarify that incorporating dynamics was designed to complement, not replace, existing world-systems methods. Furthermore, I believe that the three different types of the world-systems methods are complementary to each other, which means that the utilization of the world-systems methods can be maximized when the three world-systems are used together.

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