



ISHA NEWSLETTER

International Social History Association

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Capitalism: The Reemergence of a Historical Concept

by
Jürgen Kocka



“Capitalism” is a controversial concept.¹ Many historians and social scientists either avoid the concept altogether or refer to it only in passing. The term suffers from being perceived as too broad, holistic, and vague or is rejected as too value-loaded, ideological, and polemic. However, capitalism was not always mistrusted in this way—in the late nineteenth and early twentieth century it played an increasingly vital role, not only in social criticism but also in scholarly discourses. And presently, it seems to be enjoying a comeback. This volume explores the term’s usefulness and its limits in social and economic history.

While “capital” and “capitalist” are older terms, the substantive “capitalism” appeared in European languages not before the second half of the nineteenth century. It emerged as a critical concept, but it did not take long before it was used as a descriptive and analytical tool

¹ The paper is the abridged version of the introduction to a volume with the same title, edited by Jürgen Kocka and Marcel van der Linden and published by Bloomsbury Academic, London, 2016. The book is published under the auspices of the International Social History Association. It is based on ISHA panels organized at the World Economic History Congress held in Stellenbosch, South Africa, July 2012.

by social scientists, too. In 1850 Louis Blanc defined “capitalism” as “appropriation of capital by some to the exclusion of others.” One year later, Pierre Joseph Proudhon castigated landed property on the Parisian house market as a “fortress of capitalism.” In 1867 the *Grand dictionnaire universel du XIXe siècle* defined “capitalism” as “power of capital or capitalists.”

In German, the concept was not at all pioneered by Karl Marx and Friedrich Engels, as some might assume. In the 1850s and 1860s, they wrote a great deal about the “capitalist mode of production” and “capitalist accumulation” but used the noun “capitalism” only later and rather marginally. It was an economist with state-socialist sympathies, Johann Karl Rodbertus, who wrote in 1869, “Capitalism has become a social system.” The liberal-conservative professor of economics, Albert Eberhard Friedrich Schäffle published his *Kapitalismus und Sozialismus* in 1870 in which he defined “capitalism” as a “national and international organism of production under the leadership of ‘entrepreneurial’ capitalists competing for highest profit.” In 1896, *Meyers Universallexikon* carried an entry on “capitalism” defining it as the “capitalist mode of production in contrast to the socialist and collectivist one.” In 1902, Werner Sombart published the first edition of his *Der moderne Kapitalismus*. From then on, a rich literature on “capitalism” emerged. Max Weber notably contributed to it.

In Great Britain, the concept was already known by 1855, but then reluctantly introduced from the 1880s onward, especially in Fabian circles. John A. Hobson published his *The Evolution of Modern Capitalism* in 1894 in which he concentrated on the rise of the factory system. The *Encyclopedia Britannica* first mentioned the concept in its 1910/11 edition and carried a whole entry on the term in 1922, defining “capitalism” as “a system in which the means of production were owned by private proprietors who employed managers and workers for production.” The history of the concept in the United States paralleled that of Great Britain, though there is evidence that the term was known to radical working-class circles before journalists and scholars adopted it. Here, Thorstein Veblen was one of the first who used it in his *Instinct of Workmanship* of 1914.²

Individualized property rights; commodification on markets for goods, labor, land, and capital; the price mechanism and competition; investment, capital, and profit; the distinction between power holding proprietors and dependent property-less waged workers, tensions between capital and labor; rising inequality; the factory system and industrialized production—these were, in varying combinations, major characteristics of the concept as it emerged. It was mostly used to denote an economic practice or an economic system, frequently with special attention to its social and cultural consequences.

Definitions varied. While authors in the Marxist tradition stressed the system of production, the surplus value of contractual labor, the relentless capital accumulation, commodification, and the dynamic class antagonism between workers and the bourgeoisie as major criteria of “capitalism,” Max Weber, together with Werner Sombart, emphasized the role of the market, the importance of belief systems, as well as the systematic (“rational”) organization of business and work in the enterprise (the enterprise being separate from households and politics) as a feature of modern capitalism.

² Cf. Jürgen Kocka, “Capitalism: The History of the Concept,” in the *International Encyclopedia of the Social & Behavioral Sciences*, ed., James D. Wright, 2nd ed., vol. 3 (Amsterdam: Elsevier, 2015), 105–110; Michael Merrill, “How Capitalism Got Its Name,” *Dissent*, no. 4 (Fall 2014): 87–92; Richard Passow, “*Kapitalismus*” *Eine begriffliche-terminologische Studie* (1918): 2nd ed. (Jena: Gustav Fischer, 1927); Edmond Silberner, “Le mot capitalism,” *Annales d’histoire sociale* 2 (1940): 133–34; Raymond Williams, *Keywords. A Vocabulary of Culture and Society* (New York: Croom Helm, 1976), 42–44; Marie-Elisabeth Hilger, “Kapital, Kapitalist, Kapitalismus,” in *Geschichtliche Grundbegriffe. Historisches Lexikon zur politisch-sozialen Sprache in Deutschland*, eds Otto Brunner et al., Vol. 3 (Stuttgart: Klett-Cotta, 1982), 339–54, esp. 442 ff.; Howard Brick, *Transcending Capitalism. Visions of a New Society in Modern American Thought* (Ithaca, NY: Cornell Univ. Press, 2006), 23–33; Jürgen Kocka, *Geschichte des Kapitalismus*, 2nd ed. (Munich: C. H. Beck, 2014), 6–23.

But, most definitions have had something in common: authors have used the concept to identify basic experiences *of their own time*, perceived as modern, new, and different from more traditional socio-economic relations, which had been less prone to growth and fast change and which had largely been based on non-market principles, e.g., on feudal, corporate, or household principles. Or, the concept capitalism has been used to contrast the present system with the idea of socialism and, then, its beginnings. In other words, capitalism has always been a concept of difference. It once got its vigor from contrasting the present with a frequently idealized past as well as with an imagined and sometimes utopian future.

Clearly, the concept was not merely a political catchword or a key concept of social criticism in the late nineteenth and early twentieth century but also an analytical concept. It was furthermore used for the purpose of historical analysis. Authors like Henri Pirenne and Richard Tawney used it in order to look into medieval and early modern European history where they found early forms of capitalism, not yet fully developed and usually surrounded by non-capitalist environments.³

Among later definitions,⁴ that of Fernand Braudel deserves particular attention. With reference to the early modern period, Braudel sharply distinguished “capitalism” from “market economy.” He saw local markets, fairs, and stores, the everyday practice of exchange by producers, traders, and consumers as constitutive for market economies throughout the ages and nearly everywhere in the world, whereas he tried to reserve the term “capitalism” for the businesses of a relatively narrow and exclusive superstructure of wealthy and influential merchants, bankers, ship owners, proprietors, entrepreneurs, and financial capitalists. Among them, competition played a minimal role, but vying for close contacts to the holders of political power was paramount. Braudel also further developed the tradition of seeing capitalism as a world-historical development. He strongly influenced authors like Immanuel Wallerstein and Giovanni Arrighi who have since contributed greatly to globalizing the historical study of capitalism.⁵

There have always been authors who used the concept “capitalism” in a strictly scholarly way, outstanding economic and social historians among them.⁶ But, the concept has also played a controversial role in political debates in the public arena, far beyond academic discourses, especially in the decades of the Cold War. It became a combat term within socialist and communist rhetoric and propaganda. The term has been deeply involved in and damaged by the political and ideological struggles of the past century. This sometimes led to dichotomic simplifications and heavy distortions. The more capitalism was used as a polemic catch-

³ Lujo Brentano, *Die Anfänge des modernen Kapitalismus* (Munich: Verlag der K. B. Akademie der Wissenschaften in Kommission, 1916); Henri Pirenne, “The Stages in the Social History of Capitalism,” *The American Historical Review* 19 (1914): 494 ff.; R. H. Tawney, *Religion and the Rise of Capitalism. A Historical Study* (Gloucester, MA: Harcourt, Brace and Co., 1962); Henri Eugène Sée, *Les origines du capitalisme moderne* (Paris: Armand Collin, 1926); J. R. Commons, *Legal Foundations of Capitalism* (New York: Macmillan, 1924).

⁴ Keynes saw “the essential characteristic of capitalism” in its “dependence upon an intense appeal to the money-making and money-loving instincts of individuals as the main motif force of the economic machine” in his *The End of Laissez-Faire* (London: Hogarth Press, 1927), 50 f.; Schumpeter defined “capitalism” as “that form of private property economy in which innovations are carried out by means of borrowed money which in general implies credit creation” in his *Business Cycles*, vol. 1 (Philadelphia: Martino, 1939), 223 f., and later on he famously discovered “creative destruction” as the core of capitalism in *Capitalism, Socialism and Democracy* (London-New York: Routledge, 1942).

⁵ Fernand Braudel, *Civilisation matérielle, économie et capitalisme*, 3 vols (Paris: Armand Colin, 1967–79); Peer Vries, “Europe and the Rest. Braudel on Capitalism,” in *Aufbruch in die Weltwirtschaft: Braudel wiedergelesen*, eds G. Garner and M. Middell (Leipzig: Leipziger Universität Verlag, 1914), 81–114; Immanuel Wallerstein, *The Modern World-system*, 4 vols (Berkeley, CA: Univ. of California Press, 2011); G. Arrighi, *The Long Twentieth Century: Money, Power and the Origins of our Time* (London: Verso, 1994).

⁶ E.g., David S. Landes, *The Rise of Capitalism* (New York: Macmillan, 1966); Eric Hobsbawm, *The Age of Capital 1848–1875* (London: Weidenfeld and Nicolson, 1975); also see Albert A. Hirschman, *The Passions and the Interest: Political Arguments For Capitalism Before Its Triumph* (Princeton: Princeton Univ. Press, 1977).

word in politico-ideological conflicts, the less it appealed to scholars. They criticized it or avoided it altogether.⁷

Since the 1990s, something like a limited revival of the concept can be observed, within general discussions as well as in the social and historical sciences.⁸ Why? *On the one hand*, the Cold War is over. Nowadays, capitalism is much less the combat term in a systemic conflict of global scale that it had been for most of the twentieth century. Freed from this burden, the concept has, *on the other hand*, been tied to a resurgence of market liberalism from late 1970s onwards, primarily on the level of neoliberal discourses but partly also in economic and social policy. Between World War I (at the latest) and the 1970s powerful trends towards more political coordination of markets, more planned organization of competition, and more welfare state intervention had been underway, at least in parts of Europe and North America. Then, some observers spoke of a move towards “organized capitalism,” others argued that a transition from nineteenth century industrial capitalism to a “mixed system” or a post-capitalist era was approaching.⁹ In the increasingly neoliberal atmosphere since the 1970s—at least in the US and in some parts of Europe (including Eastern Europe since the 1990s)—this perspective has lost ground. In some parts of the intellectual spectrum, capitalism had always been used in an unconditionally positive sense, at least in the US. Now, an affirmative or a strictly neutral usage of the term is gaining additional ground.¹⁰ *Thirdly*, the Great Recession of 2008 had, it is true, an opposite effect. It led to a renewed questioning of the neoliberal belief in the self-regulating capacities of capitalist markets and to new proposals in favor of re-regulation—but it also contributed to a rising scholarly interest in the term “capitalism.”¹¹ *Fourthly*, the accelerated globalization of capitalism in the last decades has demonstrated that capitalism can flourish in very different social contexts and under very different political regimes, also in authoritarian and dictatorial systems, at least for a while. A well-defined concept of capitalism appears to be well-suited for guiding comparative research on a global scale, now on the agenda. The global historical analysis of capitalism could lead to important changes in a number of theses, e.g., with respect to the relation between unfree labor, wage labor on a contractual basis and capitalism. The close relationship between the rise of capitalism and slavery has recently received much attention, e.g., in textile and textile-related industries and particularly in the plantation economies of the Americas, Asia, and Africa. Indeed, the debate on the relations between capitalism, freedom, and democracy has been reopened.¹²

⁷ S. G. Marks, “The Word ‘Capitalism’: The Soviet Union’s Gift to America,” *Society* 49 (2012): 2, 155–163; F. Friedrich A. Hayek, ed., *Capitalism and the Historians* (Chicago: Univ. of Chicago Press, 1954); Richard Grassby, *The Idea of Capitalism Before the Industrial Revolution* (Lanham: Rowman & Littlefield, 1999).

⁸ Cf. J. Sklansky, “The Elusive Sovereign: New Intellectual and Social Histories of Capitalism,” *Modern Intellectual History* 9, 1 (2012): 233–248.

⁹ Cf. Howard Brick, *Transcending Capitalism* (Ithaca, NY: Cornell Univ. Press, 2006), 54–85; Heinrich August Winkler, ed., *Organisierter Kapitalismus: Voraussetzungen und Anfänge* (Göttingen: Vandenhoeck & Ruprecht, 1974).

¹⁰ Cf. Milton Friedman, *Capitalism and Freedom* (Chicago: University of Chicago Press, 1962); John Mackey, *Conscious Capitalism: Liberating the Heroic Spirit of Business* (Cambridge MA: Harvard Business Review Press, 2013); an influential example of the analytical use of the concept: Peter A. Hall and David Soskice, eds., *Varieties of Capitalism: The Institutional Foundations of Comparative Advantage* (Oxford: Oxford Univ. Press, 2001).

¹¹ Cf. Friedrich L. Pryor, *Capitalism Reassessed* (Cambridge: Cambridge Univ. Press, 2010).

¹² Cf. Marcel van der Linden, *Workers of the World: Essay Toward a Global Labor History* (Leiden: Brill, 2008); Edward E. Baptist, *The Half Has Never Been Told. Slavery and the Making of American Capitalism* (New York: Basic Books, 2014); Sven Beckert, *Empire of Cotton: A Global History* (New York: Alfred A. Knopf, 2014); Kalyan Sanyal, ed., *Rethinking Capitalist Development: Primitive Accumulation, Governmentality and Post-Colonial Capitalism* (London: Routledge, 2007); Jürgen Kocka and Wolfgang Merkel, “Kapitalismus und Demokratie,” in *Demokratie und Krise: Zum schwierigen Verhältnis von Theorie und Empirie*, ed., Wolfgang Merkel (Wiesbaden: Springer-Verlag, 2015), 307–337.

In this situation, the concept “capitalism” enjoys increasing popularity, among historians and social scientists, more than among economists, and clearly more in the English-speaking realm than in German-speaking academic circles, for instance.¹³ Definitions continue to differ.¹⁴ For the present purpose, we propose the following working definition of capitalism:¹⁵

- First, in capitalism, it is essential that individual and collective actors dispose of rights which enable them to make economic decisions in a relatively autonomous and decentralized way.
- Second, in capitalism, the coordination of the different economic actors takes place primarily through markets and prices, through competition and cooperation, demand, supply, and the exchange of commodities. The commodification of resources and products is central, including the commodification of labor, largely (but not exclusively) in the form of contractual (“free”) labor for wages and salaries. This is where the tension between classes is built into the definition of capitalism.
- Third, capital is central for this type of economy. This entails the investment of savings and returns in the present with the perspective of higher gains in the future, the importance of profit as a major yardstick of success, and accumulation with the perspective of innovation and growth. Accepting uncertainty and risk is implied, as well as the notion of profitability and its systematic control over time. The time factor—a certain relation between life in the present and expectations as to the future—is important.

This working definition of capitalism should be understood as an ideal type, a model, which can be used even though one knows that historical reality is never fully identical with it. It allows one to see capitalism as a process in history, with gradual beginnings, discontinuous development, uneven distribution over space and time. It allows one to distinguish between types of capitalism, at least: merchant capitalism (developing in many parts of the world in different centuries); agricultural capitalism (developing in Europe during the early modern period); finance capitalism (well developed in Europe long before industrialization got under way; expanded and uplifted on a global scale since the 1970s); industrial capitalism (since the

¹³ Dennis C. Mueller, ed., *The Oxford Handbook of Capitalism* (Oxford: Oxford Univ. Press, 2012); Larry Neal and Jeffrey G. Williamson, eds, *The Cambridge History of Capitalism*, 2 vols (Cambridge: Cambridge Univ. Press, 2014); Leo Panitch and Sam Gindin, *The Making of Global Capitalism: The Political Economy of American Empire* (London: Verso, 2012); “In History Departments, It’s Up with Capitalism,” *New York Times*, April 6, 2013, http://www.nytimes.com/2013/04/07/education/in-history-departments-its-up-with-capitalism.html?_r=0 (Accessed September 2015); Joyce Appleby, *The Relentless Revolution: A History of Capitalism* (New York: W. W. Norton and Co., 2010); Michael Zakim and Gary J. Kornblith, eds, *Capitalism Takes Command: The Second Transformation of Nineteenth-century America* (Chicago: Univ. of Chicago Press, 2012); important are the works of Jerry Z. Muller, *The Mind and the Market: Capitalism in Western Thought* (New York: Anchor, 2003); idem, *Capitalism and The Jews* (Princeton: Princeton Univ. Press, 2010); Hans Werner Sinn, *Kasino-Kapitalismus: Wie es zur Finanzkrise kam und was jetzt zu tun ist* (Berlin: Ullstein Taschenbuch, 2009); Nouriel Roubini and Stephen Mihm, *Crisis Economics. A Crash Course in the Future of Finance* (New York: Penguin Books, 2010); Allan H. Meltzer, *Why Capitalism?* (Oxford: Oxford Univ. Press, 2012); Michael Mann, *The Sources of Social Power*, vol. 4 (Cambridge: Cambridge Univ. Press, 1994), 406–15; Wolfgang Streeck, *Re-forming Capitalism: Institutional Change in the German Political Economy* (Oxford: Oxford Univ. Press, 2009); Luc Boltanski and Eve Chiapello, *Le nouvel esprit du capitalisme* (Paris: Éditions Galilard, 2000) [Engl. trans. Gregory Elliott, *The New Spirit of Capitalism*, (London: Verso, 2007)].

¹⁴ E.g., Paul Swanson, *An Introduction to Capitalism* (London: Routledge, 2013): Capitalism is seen as “an economic system in which the owner of the means of production hire wage laborers to produce goods and services in order to sell in the market for a profit.” (p. 5); Michael Mann defines capitalism by commodity production, private exclusive ownership of the means of production and “free” labor separated from the means of production (*The Sources of Social Power*, vol. 2, p. 23 f.); For yet another definition, see Geoffrey Ingham, *Capitalism: With a New Postscript on the Financial Crisis and Its Aftermath* (New York: Polity, 2011), 53.

¹⁵ Jürgen Kocka, “Writing the History of Capitalism,” (lecture, German Historical Institute, Washington DC, April 29, 2010) subsequently printed in the *Bulletin of the German Historical Institute*, 47 Fall (2010): 7–24; Jürgen Kocka, *Geschichte des Kapitalismus* (Munich: Beck, 2013), 20–23. [Engl. transl. *Capitalism. A Short History*, (Princeton: Princeton Univ. Press, 2016)].

late eighteenth and nineteenth century, starting in Western Europe and expanding from there). Capitalism clearly preceded industrialization, but it reached a status of relative dominance and a fully developed shape (including wage labor as a mass phenomenon and the systematic organization of business and work in enterprises/corporations) only with industrialization. Capitalism defined this way can be dominant in post-industrial economies as well.

On another axis, one can compare types of capitalism with respect to the different relations between markets and states (including state capitalism). The concept allows comparison across regions. It allows—and requires—one to look outside Europe (and the West) and explore the many interrelations and interactions, crisscrossing the boundaries between regions, nation-states, and continents, that are key to the rise of capitalism and its present shape.

While economic elements are central in this definition, it takes into account that capitalism is not only an economic phenomenon, but certain legal elements (e.g., contracts), social elements (e.g., specific patterns of inequality and tension), and cultural elements (e.g., a specific handling of the time factor) are integral. Capitalism has always been heavily dependent on non-economic conditions: law, culture, social relations, family, religion, etc. Capitalism, however, also deeply influences social relations, cultures, and politics. Yet, what must be clear is that capitalism as defined above could and can flourish under different (though not all) social, cultural, legal, and political circumstances.

We see several advantages in using capitalism as an analytical concept in historical studies. If one looks for tools which help bring together economic, social, cultural, and political dimensions of history,¹⁶ the concept “capitalism” may be useful. Its multi-dimensional—in this sense integrative—character may be advantageous for historians who, having felt the impact of the “cultural turns” of the 1980s and 1990s, moved far away from economic dimensions but want to bring these back into their work. It may also benefit economic historians who strive for new approaches in bringing structural and agency-related dimensions of history together. It allows for the connection between the history of practices and discourses. The concept “capitalism” emphasizes the social, cultural, and political “embeddedness” (Polanyi) of markets, the relations between micro-economic behavior (e.g., of single firms and entrepreneurs) and macro-economic processes. It invites the study of non-economic aspects, conditions, and consequences of economic behavior and processes. Economic historians and other historians have moved away from each other in recent decades. The study of capitalism may serve as an occasion for re-integrating these sub-fields to some extent.

Most studies of capitalism stress the unstable character of economic processes. The concept “capitalism” turns researchers’ attention to tensions and contradictions inside the economic and social worlds that account for instability and serve as engines of change. The Marxian understanding of the tension between “means of production” and “relations of production” continues to be useful. Schumpeter’s analysis of business cycles and of the role of “creative destruction” can be of value as well. Daniel Bell’s notion of “cultural contradictions of capitalism” is another case in point.¹⁷ If we decide in favor of capitalism as a central analytical tool, we find access to a long and mostly marginalized tradition of thought and research, which may improve our resources for studying crises, change, and the role of the economy in history. Since the history of capitalism necessarily includes the history of *Kapitalismuskritik*, it tends to involve us in very fundamental problems of the history of civilization and in discussions of the human condition.¹⁸

Does interest in the history of capitalism enable us to ask new questions, explore not yet exhausted sources or data, and discover connections between phenomena usually not seen as

¹⁶ Cf. Francesco Boldizzoni, *The Poverty of Clio: Resurrecting Economic History* (Princeton: Princeton Univ. Press, 2011).

¹⁷ Daniel Bell, *The Cultural Contradictions of Capitalism* (New York: Basic Books, 1976).

¹⁸ See, e.g., Immanuel Wallerstein et al., *Does Capitalism Have a Future?* (Oxford: Oxford Univ. Press, 2013).

linked? Do fields of study like business and entrepreneurial history or labor history appear in a new light if pursued with the help of this concept? Is there a re-emergence of the concept in specific fields? Should there be such a re-emergence? Are there dangers and disadvantages built into such a re-orientation? Should the concept be modified, and if so, how, in order to increase its usefulness in different areas?

These are the questions we shall deal with in the following chapters. Youssef Cassis explores the potential of the concept for a history of economic crises, thus bringing experiences of the past and challenges of the present together. Andrea Komlosy deals with the history of work and labor relations, i.e., a subfield which never moved fully away from using the language of “capitalism” but which is in a process of basic change due to its global historical broadening. How do we make use of the concept “capitalism” in the history of consumption? Victoria de Grazia deals with this topic. Business history, the history of firms, and entrepreneurial history included, is closely related to central aspects of capitalism, e.g., profit orientation, accumulation, risk, market successes and failures, market behavior in relation to civil society, and state regulation. Patrick Fridenson considers what a renewed interest in capitalism might, and perhaps should, change in the field of business history. During the last decades, finance capitalism has played a decisive and disruptive role in the history of capitalism’s global expansion and crisis. Harold James puts this recent history in its long-term context. Andreas Eckert applies the concept “capitalism” to an analysis of economic change and labor in Africa. Immanuel Wallerstein redefines the concept for his own critical look on modern economic history. First versions of most of the papers were presented and discussed in a panel of the World Congress of Economic History in Stellenbosch, South Africa in July 2012. The editors are grateful to Gareth Austin and Sven Beckert who served as commentators in the panel and subsequently also contributed their comments to this volume. In his concluding chapter, Marcel van der Linden summarizes results and addresses perspectives for further research.

Why the concept of capitalism persists

by
Marcel van der Linden



When R.H. Tawney published his book *Religion and the Rise of Capitalism* in 1922 a reviewer commented that the term ‘capitalism’ was a political catch-phrase which did not belong in a serious historical study.¹ Tawney replied as follows:

“Obviously, the word ‘Capitalism,’ like ‘Feudalism’ and ‘Mercantilism,’ is open to misuse. [...] But, after more than half a century of work on the subject by scholars of half a dozen different nationalities and of every variety of political opinion, to deny that the phenomenon exists; or to suggest that, if it does exist, it is unique among human institutions, in having, like Melchizedek, existed from eternity; or to imply that, if it had a history, propriety forbids that history to be disinterred, is to run willfully in blinkers. Verbal controversies are profitless; if an author discovers

¹ The paper is the abridged version of the conclusion of a volume with the title *Capitalism: The Reemergence of a Historical Concept* edited by Jürgen Kocka and Marcel van der Linden and published by Bloomsbury Academic, London, 2016. The book is published under the auspices of the International Social History Association. It is based on ISHA panels organized at the World Economic History Congress held in Stellenbosch, South Africa, July 2012.

a more suitable term, by all means let him use it. He is unlikely, however, to make much of the history of Europe during the last three centuries, if, in addition to eschewing the word, he ignores the fact.”²

So despite repeated attempts to abolish it, the concept of capitalism persisted. The reason is that it refers to a pattern of qualitatively novel experiences in social life. These new experiences stand in clear contrast with preceding societies, which were mainly oriented toward the utility of resources: their economic activities served to acquire specific goods and services, such as foodstuffs, clothing, weapons, ornaments, servants and soldiers. Economic activities were oriented to subsistence, or, additionally, to the production of a surplus which allowed an intellectual and artistic *praxis* by an elite (such as in ancient Greece), or conspicuous consumption, warfare and empire building. We can find examples of this utility-orientation everywhere around the world, among hunter-gatherers, small peasants, and patriarchal households.

Of course trade also existed in use-oriented societies, for example because the surplus owned by A could be exchanged for a different surplus owned by B. Transactions could even occur across great distances, and via intermediaries. Usually though they played a subordinate role within these societies themselves. Most of the transactions occurred in markets which were held daily or almost daily, although many ancient societies also featured larger markets occurring less frequently. Such large markets were often a special event. They were more than simply an opportunity to trade goods; they also involved the expression of desires and their satisfaction, a wish to access foreign domains, a discovery of the unknown and the exotic, etc. They often had a festive atmosphere. Among the Aztecs, the largest market was the *macuiltianquiztli* in Tlatelolco, a neighbourhood in Tenochtitlan (Mexico). Here, more than 100,000 people assembled once in every twenty days, combining trade with religious festivities. In 18th century Egypt, large religious and commercial festivals were held along with smaller markets, to celebrate deities. In these festivals, merchants could reach more customers, and the local peasants could inspect goods which were not available at ordinary *suqs*. In pre-revolutionary China, annual fairs were usually combined with the feast day of the local temple's principal deity. In the European languages, words such as *feriae*, *foire*, *fair* and *Fest* refer to the common root of market and feast, exchange and pleasure.³

As soon as traders have become a separate occupational group, we can also witness the emergence of another orientation, focused less on considerations of utility than on making money. It gives rise to the idea of *abstract accumulation*, i.e. an accumulation which is not aimed at realizing a specific kind of lifestyle, but which becomes a goal in itself. *Oikonomia* (“housekeeping” in the Ancient Greek sense) is replaced by *pleonexia* (self-enrichment) – a goal that acquires an independent existence vis-a-vis its social and moral context. Ibn Khaldûn already noted that trade means “buying goods at a low price and selling them at a high price, whether these goods consist of slaves, grain, animals, weapons, or clothing material.” He added: “honest (traders) are few. It is unavoidable that there should be cheating, tampering with the merchandise which may ruin it, and delay in payment which may ruin the profit, since (such delay) while it lasts prevents any activity that could bring profit. There will also be

² Richard Henry Tawney, “Preface to 1937” in his *Religion and the Rise of Capitalism. A Historical Study* (Harmondsworth: Penguin, 1937), pp. vii-viii.

³ Ursula Thiemer-Sachse, “Marktwesen und Fernhandel bei den Azteken am Vorabend der spanischen Eroberung Mexikos”, *Das Altertum*, 35, 4 (1989), pp. 241-8, at 245-6; Barbara K. Larson, “The Rural Marketing System of Egypt over the Last Three Hundred Years”, *Comparative Studies in Society and History*, 27, 3 (July 1985), pp. 494-530, at 504; G. William Skinner, “Marketing and Social Structure in Rural China (Part I)”, *Journal of Asian Studies*, 24, 1 (November 1964), pp. 3-43, at 38; Horst Kurnitzky, *Der heilige Markt. Kulturhistorische Anmerkungen* (Frankfurt am Main: Suhrkamp, 1994), p. 18.

non-acknowledgement or denial of obligations, which may prove destructive of one's capital unless (the obligation) has been stated in writing and properly witnessed."⁴

When this attitude of merciless accumulation gains influence in areas which were previously only use-oriented, the distinction between the two is recognized by more and more people. In 1840, Thomas Carlyle summed up the trend in an exaggeration: "Cash Payment", he asserted, had "grown to be the universal sole nexus of man to man!"⁵ A few years later, this idea of a *cash nexus* appears again in Marx and Engels's *Manifesto of the Communist Party*, according to which the bourgeoisie "has pitilessly torn asunder the motley feudal ties that bound man to his 'natural superiors', and has left remaining no other nexus between man and man than naked self-interest, than callous 'cash payment'."⁶ More theorizing along these lines occurred in the 1860s and 1870s, when the emerging discipline of anthropology led to evolutionist reflections by scholars about "then" and "now" – where "then" meant the "primitive" societies, about which more became known through the explorations of colonists. Sir Henry Maine wrote in his book *Ancient Law*:

"The movement of the progressive societies has been uniform in one respect. Through all its course it has been distinguished by the gradual dissolution of family dependency and the growth of individual obligation in its place. The individual is steadily substituted for the Family, as the unit of which civil laws take account. [...] Nor is it difficult to see what is the tie between man and man which replaces by degrees those forms of reciprocity in rights and duties which have their origin in the Family. It is Contract. Starting, as from one terminus of history, from a condition of society in which all the relations of Persons are summed up in the relations of Family, we seem to have steadily moved towards a phase of social order in which all these relations arise from the free agreement of individuals."⁷

The new individualized and businesslike relationships pervaded daily life in many different ways. The tendency to 'measure' more and more things (pantometry)⁸ was clearly evident in education, where pupils were encouraged to compete with each other, and where their performance was judged with linear criteria (grades), etc. In the early 20th century, Werner Sombart used the "taxametrization" of coaches as an example to describe a trend toward formalization:

"the old relationship between coachman and customer is of a very personal character: the conditions under which the journey is undertaken are fixed in a personal talk on a case by case basis; at the time of payment, the personal character of the relationship is most clearly expressed by the variation in charges. If however a taxameter is affixed to the carriage, then all the personal, individual or coincidental aspects in the relationship between coachman and passenger are annulled; the latter just mutely pays the amount shown by the meter."⁹

Taxametrization was Sombart's metaphor to express the *general* depersonalization which he noticed in many different areas of life, including catering and hotel accommodation, written correspondence, the numbering of street addresses, and the transition to stable feeding.

It is against this background that the ascent of the concept of capitalism began. The term expresses that the *concrete* aim to procure useful things is subordinated to the *abstract* aim

⁴ Ibn Khaldūn, *The Muqaddimah. An Introduction to History*. Trans. Franz Rosenthal. Vol. 2 (London: Routledge & Kegan Paul, 1958), pp. 336 and 342.

⁵ Thomas Carlyle, *Chartism* (London: James Fraser, 1840), p. 58.

⁶ Karl Marx and Friedrich Engels, "Manifesto of the Communist Party" (1848), in: Karl Marx, *The Revolutions of 1848*. Edited and Introduced by David Fernbach (Harmondsworth: Penguin, 1973), pp. 67-98, at 70.

⁷ Henry Maine, *Ancient Law* (London: John Murray, 1861), p. 163. Maine sums it up as a movement "from Status to Contract" (p. 165).

⁸ Alfred Crosby: *The Measure of Reality: Quantification and Western Society, 1250-1600* (Cambridge: Cambridge University Press, 1997).

⁹ Werner Sombart, *Der moderne Kapitalismus. Historisch-systematische Darstellung des gesamteuropäischen Wirtschaftslebens von seinen Anfängen bis zur Gegenwart*, 3rd edition, vol. II/1 (Munich: Duncker & Humblot, 1919), p. 1078.

to make money and realize profits. And it is precisely this experiential background which can explain the stubborn persistence of the concept – despite repeated attempts to banish the term from public and scientific discourse. As soon as we try to ban the notion, it returns in another way, whether as commodification, commercialization, money-making or market-orientation, etc. In his book *The Wheels of Commerce*, Fernand Braudel wrote on the notion of “capitalism”: „Personally, after a long struggle, I gave up trying to get rid of this troublesome intruder. I decided in the end that there was nothing to be gained by throwing out along with the word the controversies it arouses, which have some pertinence to the present-day world. [... If] capitalism is thrown out of the door, it comes in through the window.”¹⁰

Definitions

Although “capitalism” refers to real experiences, there is certainly no unanimity about its definition.

Nowadays, two interpretations seem to predominate which are often at loggerheads with each other. One interpretation, which goes back to Adam Smith, is defended by Immanuel Wallerstein among others. It says that capitalism exists wherever there exists “a system of production for sale in a market for profit and appropriation of this profit on the basis of individual or collective ownership”.¹¹ According to this approach, it does not matter what the social relations *within* the production system look like (whether there is e.g. serfdom or wage labour); what matters is only a type of economic behaviour which is oriented toward market sales and profitmaking.

The other interpretation has its source in the Marxian tradition, and defines capitalism (or the capitalist mode of production) as generalized commodity production. This interpretation means that capitalism exists, when not just the goods and services *created* by the production system take the form of commodities, but also that all the *inputs* of that system – including labour, resources and means of production – are purchased as commodities.¹² Tendentially “production of commodities by means of commodities” takes place (borrowing Piero Sraffa’s famous expression); it involves a progressing circulation of commodity production and distribution, such that not just labour products but also means of production and labour capacity acquire the status of commodities. The commodification of human labour capacity does not necessarily have to take the form of wage labour (as both Marx and Weber believed), but can also be based on physical coercion, as is the case with indentured labour or chattel slavery.¹³ Nevertheless, it remains true that capitalism’s “single most important innovation is the vast expansion of wage labor” – as Sven Beckert concludes.

Capitalism cannot exist without commodity production and commodity trade. Yet commodities are not a “stand alone” phenomenon. Their existence presupposes the presence of at least three other phenomena: property rights, money and competition.

Property rights. Commodities can be bought and sold only by their owners or their legal representatives. Commodities therefore assume property rights, i.e. bundles of enforceable claims.¹⁴ Each property right is backed with the threat of public enforcement via some kind of sanction – and, in the last instance, physical coercion.

¹⁰ Fernand Braudel, *Civilization and Capitalism 15th-18th Century*. Vol. 2, *The Wheels of Commerce*. Trans. Siân Reynolds (London: Phoenix Press, 2002), 231.

¹¹ Immanuel Wallerstein, “Dependence in an Interdependent World: The Limited Possibilities of Transformation Within the Capitalist World Economy”, *African Studies Review*, 17, 1 (April 1974), pp. 1-27, at 1.

¹² See, e.g., Robert Brenner, „The Origins of Capitalist Development: A Critique of Neo-Smithian Marxism“, *New Left Review*, No. 104 (July-August 1977), pp. 25-92.

¹³ See, for a more elaborate argument, my book *Workers of the World. Essays toward a Global Labor History* (Leiden: Brill, 2008).

¹⁴ Wesley Newcomb Hohfeld, *Fundamental Legal Conceptions as Applied in Judicial Reasoning* (New Haven, CT: Yale University Press, 1919; reprint Westport, CT: Greenwood Press, 1978). Modern legal theory breaks property rights into the following rights and duties: (i) the right to possess, (ii) the right to use, (iii) the right to manage, (iv) the right to the income of the object, (v) the right to the capital, (vi) the right to security, (vii) the

Money. Commodities are bought and sold for money, a general equivalent (and a special kind of commodity) in which the price of diverse goods and services can be reckoned. Money – which originally may have had a religious and cultic function¹⁵ – can become a fetish, because in capitalism it appears that everything revolves around money (abstract wealth) as a means to acquire every possible kind of goods and services. Money makes financial credit possible, and therefore also an independent currency trade and a finance industry. “Credit creation” is, as Harold James observes, “the driving force of the modern monetary economy.”

Competition as such is obviously not typical for capitalism. Chiefdoms and states also compete with each other. But the nature of competition in the field of commodity production and trade is specific. “The basic law of capitalist competition” is not mainly about territory or political power but, as Marx emphasized,¹⁶ about realizing profit from the production and sale of commodities – in which control over territories and political power can of course be a very useful aid. The biggest profit rate is naturally reached when there are no rivals in the market. That is why competition constantly involves attempts to abolish competition – a tendency which Norbert Elias calls the *monopoly mechanism*.¹⁷ Immanuel Wallerstein also refers to this phenomenon in his contribution.

These aspects straightaway make it clear, that the history of capitalism cannot be written without systematic attention to rules, laws and politics (Patrick Fridenson). More: a history of capitalism is inconceivable without a parallel, integrated history of nations states, national banks, government debt and labour relations. Every capitalism requires institutions which regulate markets, the circulation of money and forms of employment. A number of authors in the present volume also rightly point out that capitalism is not just an economic system; the discontinuous yet still progressing commodification process influences every sphere of life, from ecology and agriculture via kinship and family life, to war-making.

The regulated combination of commodification with property rights, money and competition makes capitalism an ever-restless and enormously dynamic system. John Ramsay McCulloch remarked almost two centuries ago: “There are no limits to the passion for accumulation.”¹⁸ A 1952 study commissioned by the American Economic Association similarly described this striving in a striking way:

“[In capitalism] real assets and consumables, in bulk, if not in composition, are valued not for themselves but for their monetary equivalent. All things are thought of as exchangeable and saleable, and therefore as convertible into money, the universal solvent. The money measure of goods becomes the *real* expression of their value. Goods are money, and, from the viewpoint of capitalist motivation, it is from this equivalence that they derive their worth. [...] Thus the energy and ability which, in some societies, are directed toward religion, politics, art, or war are, in the developed capitalist milieu, channeled into business.”¹⁹

right of transmissibility, (viii) the right of absence of term, (ix) the duty to prevent harmful use, (x) liability to execution, and (xi) the incident of residuary.” For full ownership in an object a proprietor must hold most (but not necessarily all) of all these elements regarding that object. See Anthony M. Honoré’s classical essay “Ownership”, in: Anthony Gordon Guest (ed.), *Oxford Essays in Jurisprudence. A Collaborative Work* (Oxford: Clarendon Press, 1961), pp. 107-147.

¹⁵ Bernhard Laum, *Heiliges Geld* (Tübingen: J.C.B. Mohr (Paul Siebeck), 1924), esp. pp. 126-57; Emile Benveniste, *Le Vocabulaire des institutions indo-européennes*, vol. I (Paris: Minuit, 1968), pp. 132-3; Jean-Marie Servet, *Nomismata. Etat et origines de la monnaie* (Lyon: Presses universitaires de Lyon, 1984).

¹⁶ Karl Marx, *Capital*, III (Harmondsworth: Penguin, 1981), p. 127.

¹⁷ Norbert Elias, *The Civilizing Process: Sociogenetic and Psychogenetic Investigations* (Oxford: Blackwell, 2000).

¹⁸ John Ramsay McCulloch, *The Principles of Political Economy: with a Sketch of the Rise and Progress of the Science* (Edinburgh: William and Charles Tait, 1825), p. 178.

¹⁹ Moses Abramovitz, “Economics of Growth”, in: Bernard F. Haley (ed.), *A Survey of Contemporary Economics*, vol. II (Homewood, IL: Richard D. Irwin, Inc., for the American Economic Association, 1952), pp. 132-78, at 159-60.

Greed can certainly play a role in this incessant process of accumulation, but it is not an absolute requirement. Other motives, such as frugality and ambition, can be just as important, as Max Weber already knew.

Periods and types

It is obvious that a broad definition of capitalism will lead to a different historical periodization than a narrow one. According to some Smithians, capitalism has already existed for more than two thousand years. According to most Marxian scholars, however, we should date the beginning of capitalism in the 18th century, because at that time a lot of wage labour and manufactories first emerged in Western Europe. Depending on the definition used, further periodizations are possible. In this book the authors offer different kinds of periodizations. Harold James proposes to subdivide the history since 1300 in seven epochs, with turning points at 1690, 1800, 1890, 1914, 1990 and 2010. Patrick Fridenson emphasizes two turning points: around 1900, when the foundations for mass consumption and welfare states were laid, and in the 1960s-70s when “solid modernity” began to make way for “liquid modernity”. Victoria de Grazia too signals the last-mentioned transition which she characterizes as the rise of a new consumption regime.

Such attempts at periodization are certainly useful, and they have a lengthy history. They enable us to order the historical material, and put it in perspective. At the same time, however, it obviously also carries a risk of over-systematization, where turning points are exaggerated, and continuities are overlooked. Every attempt at the periodization of a phenomenon necessarily assumes that the development of the phenomenon contains both continuities and discontinuities. If nothing changed in the course of time, a periodization would not make any sense. Inversely, if everything changed all the time, purely by accident, no periodization would be possible. Periodizing assumes the simultaneity of relative continuity and relative discontinuity. Relative continuity does not imply that there is a constant recurrence of events, but rather that, even when major changes occur, a definite structural coherence remains visible. Inversely, relative discontinuity does not mean that arbitrary changes occur, but that a disturbance of the existing relationships occurs according to some kind of identifiable logic of events.²⁰

Naturally, various periodizations can be applied side by side. Fluctuations in economic growth, demographic change, technology, consumer behaviour, trade union structures, ecological frontiers or cultural value systems can all have divergent temporalities.²¹ Changes within capitalism moreover do not occur everywhere at the same time: sometimes they generalize in the course of time, and in the process often change their form; sometimes they occur unevenly and in combination with other changes. That is one reason why it is almost impossible to mark off the start and finish of periods in an exact way. Periodizations “seldom fit neatly and exactly; historical events resist periodization into watertight compartments.”²² It seems wise to allow for the possibility of transition periods, in which the old and the new co-exist with each other.

²⁰ Bob Jessop, “What follows Fordism? On the Periodisation of Capitalism and its Regulation”, in: Robert Albritton (ed.), *Phases of Capitalist Development. Booms, Crises and Globalizations* (Palgrave Macmillan, 2002), pp. 282-99.

²¹ See, for example, Georges Duby, “L’histoire des systèmes de valeurs”, *History and Theory*, 2 (1972), pp. 15-25; Peter J. Hugill, *World Trade since 1431. Geography, Technology, and Capitalism* (Baltimore: Johns Hopkins University Press, 1993); Peter N. Stearns, “Stages of Consumerism. Recent Work on the Issues of Periodization”, *Journal of Modern History*, 69, 1 (March 1997), pp. 102-17; Marcel van der Linden, *Workers of the World. Essays toward a Global Labor History* (Leiden: Brill, 2008), Ch. 12; Edward B. Barbier, *Scarcity and Frontiers: How Economies Have Developed Through Natural Resource Exploitation* (Cambridge: Cambridge University Press, 2011). A theoretical exploration in: Helge Jordheim, “Against Periodization: Koselleck’s Theory of Multiple Temporalities”, *History and Theory*, 51, 2 (May 2012), pp. 151-71.

²² Meribeth E. Cameron, “The Periodization of Chinese History”, *Pacific Historical Review*, 15, 2 (June 1946), pp. 171-7, at 177.

Even more important, it seems to me, is Andrea Komlosy's thesis: we should not take as point of departure the stages of development in separate regions and states, but focus on the connections *between* regions and states. Then it also becomes possible to understand cultural, economic, and political transfers between different parts of the world which often result in combined and uneven developments, in which 'innovations' in one place are combined with 'regressions' in other places. The trans-Atlantic slave trade offers a good example: already in the 17th century it made possible very modern and profitable plantations in the Caribbean, yet simultaneously promoted feudalization and impoverishment in parts of Africa.

There are nevertheless also moments which hit different parts of the world almost simultaneously, although they have a different level of impact in separate regions. Global economic crises (1857-9, 1873-9, 1929-33, 1966-7, 2007-8) are such moments. Youssef Cassis examines them in detail, although he restricts his analysis mostly to the North Atlantic region.

The issue of periodization is bound up with the issue of typologies. Wallerstein is obviously right when he claims that at a world level there is only one kind of capitalism, a "singular structure", but that does not preclude that very diverse variants of capitalism have emerged within the world system. One does not have to agree with the whole analysis of Gøsta Esping-Anderson's *The Three Worlds of Welfare Capitalism* (1990) or Michel Albert's *Capitalisme contre capitalisme* (1991) in order to realize, that capitalism knows many different forms of appearance, as Youssef Cassis and Harold James have emphasized. Some variants occur quite regularly in the historical literature. One of them is "merchant capitalism" – a somewhat under-theorized concept which refers to an early form of capitalism (occurring in North Africa and the Middle East since the 9th century, and in Europe since the 12th century) in which industry and finance capital played a subordinate role.²³ Another variant is "organized capitalism" – a concept that goes back to the Austro-Marxist Rudolf Hilferding. Hilferding claimed that since about 1915 European capitalism began to get some of the characteristics of a planned economy through cartelization, and therefore could be reformed in a fundamental way through state intervention. This idea was introduced into the historical literature in the 1970s, although soon enough "the end of organized capitalism" was also diagnosed. One can also distinguish between various different business models which appear in changing combinations. In his contribution, Patrick Fridenson identifies four types of capitalist business trajectories, varying from small enterprises to large corporations. These different modes of business are generally characterized by more or less strong entrepreneurial family ties and diverse systems of finance, with different forms of liability (Harold James); but also by different locations in global commodity chains, local labour relations and workers' household economies (Andrea Komlosy).

A drawback of many typologies and periodizations of capitalism is that they are based on the histories of the old core regions in the world system – Western Europe, North America and Japan. This limitation is also visible in some of the contributions to this volume, as is noted both by Gareth Austin and Sven Beckert.

Patterns and trends

Many authors have tried to discover general tendencies in capitalist development. About some trends there is a fairly broad consensus – for example, the constantly interrupted but steadily progressing concentration and centralization of capital since the 19th century, or the likewise discontinuous but nevertheless progressing internationalization (globalization) of production and distribution. The enormously increased importance of the sphere of con-

²³ See, for example, Eugene D. Genovese and Elizabeth Fox-Genovese, *Fruits of Merchant Capital: Slavery and Bourgeois Property in the Rise and Expansion of Capitalism* (Oxford: Oxford University Press, 1983); Joseph C. Miller, *Way of Death. Merchant Capitalism and the Angolan Slave Trade, 1730-1830* (London: James Currey, 1988); Jan Luiten van Zanden, *The Rise and Decline of Holland's Economy: Merchant Capitalism and the Labour Market* (Manchester: Manchester University Press, 1993); John Day, *Money and Finance in the Age of Merchant Capitalism* (Oxford: Blackwell, 1999).

sumption (Victoria de Grazia) and of the financial sector (Harold James, Youssef Cassis) is generally accepted. Other trends are more controversial: is there in reality a tendential fall of the average rate of profit, as various classical economists argued? And is the rate of return on capital in the long term really larger than the rate of growth, as Thomas Piketty claimed? Does the gap between rich and poor countries really continue to grow more and more?

At the same time the development of capitalism is clearly uneven, both on a world scale and within different regions. Precisely by viewing the world as a unitary but differentiated whole, it becomes possible to contextualize developments in the historical core zones of capitalism much better. Consider, for example, the welfare states which emerged in a limited number of countries after the second world war. Already in the late 1960s, the political economist Ernest Mandel argued that welfare states with mass consumption minimally require a high level of industrialization and aggregate wealth, and a steady rhythm of expansion. That would exclude “three-quarters of the countries of the world from all chance of success in such experiments. At most, these can find a momentary success in about twenty countries (the United States, Canada, Australia, New Zealand, Japan, and Western Europe), which account for less than 20 per cent of the world’s population.” Welfare states would therefore necessarily be “temporary”.²⁴ Current trends do not seem to contradict this hypothesis. In OECD countries social security provisions are gradually reduced, while precarious and unstable jobs increase.

Finally, a crucial question is: if capitalism is an historical phenomenon, which conquered the world since the 17th or 18th century, will it also reach an endpoint? Marxists in particular have often claimed that capitalism is doomed in the long run; some even believed that the timing of the end could be calculated. But Youssef Cassis rightly points out, that “capitalism has never *really* been threatened by collapse during an economic crisis in the last 150 years.” Until now, the system recovered after each crisis, often instituting reforms intended to prevent a future repetition of a collapse. Still, there is a definite scholarly undercurrent which believes that the growth possibilities for capitalism are reducing, because “On the three frontiers of commodification – labour, nature and money – regulatory institutions restraining the advance of capitalism for its own good have collapsed, and after the final victory of capitalism over its enemies no political agency of rebuilding them is in sight.”²⁵

A final word

Concepts reveal, in Hegel’s words, “that which is genuinely permanent and substantial in the complexity and contingency of appearance and fleeting manifestation.”²⁶ Concepts as such cannot explain reality, but they can be building blocks for such an explanation. A scientific concept is most useful if i) it contributes to the building of theories that can explain a significant part of reality; ii) has a meaning that is entirely clear to all participants in the research; and iii) its meaning is not silently (without being mentioned explicitly) changed over time. I think that this book has shown that capitalism can be such a concept. The notion of ‘capitalism’ “identifies something that matters” (Gareth Austin); it allows us to comprehend the interconnectedness of many diverse aspects and processes in world society.

²⁴ Ernest Mandel, “Introduction”, in: Mandel (ed.), *Fifty Years of World Revolution 1917-1967. An International Symposium* (New York: Merit Publishers, 1968), pp. 11-34, at 21-2.

²⁵ Wolfgang Streeck, “How Will Capitalism End?”, *New Left Review*, Second Series, No. 87 (May-June 1914), 35-64, at 64.

²⁶ Georg Wilhelm Friedrich Hegel, Preface to the Second Edition, *Science of Logic*, §23.

Moving the “Free and Unfree Labour” Debate Forward

by

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The European Labour History Network (ELHN)

The European Labour History Network (ELHN) was launched in October 2013 by labour history scholars to increase their cooperation, , share knowledge and (digital) material, create a platform for future collective research, and organize conferences and seminars (see ISHA Newsletter 3, 2, November 2013). The Network primarily includes Europe-based scholars (professors, post-doc and doctoral researchers as well as post-graduate students) but it also seeks to connect with scholars based outside Europe, both through each ELHN working groups and through the forthcoming federation of continental labour history networks (Global Labour History Network). The first ELHN conference was held in Turin, Italy, in December 2015: <http://www.storialavoro.it/elhn-turin/>

A distinctive characteristic of the ELHN is the key role played by working groups within it. Among others, the following groups have been established: Free and Unfree Labour; Long term perspectives on remuneration; Feminist Labour History; Factory/worksite history; Labour movements and migration; Industrial heritage and structural change; and Imperial labour history.

The ELHN working group “Free and Unfree Labour”

The study of various forms of labour relations and their mutual interconnections is a key issue in labour history, truly global in its scope and appropriate for longue duree approaches. The conceptualisation of “free” and “unfree” labour, and of the “free/unfree” labour divide, has been the topic of one of the most lively scholarly debates in the last decades. The issue also holds a fundamental importance in the contemporary global society.

The ELHN working group “Free and Unfree Labour” primarily aims to bring together scholars who study diverse labour relations – chattel slavery, wage labour, debt bondage, convict labour, indentured work, sharecropping, household labour, military impressment – and who are especially interested in addressing and conceptualising their mutual connections.

Within this broad framework, the working group has three goals.

The first goal is to map the field, by sharing information about who (individual and collective) is studying related topics and where, what exactly is being studied, and which publications are available and forthcoming. Relevant information is gathered through a questionnaire and made accessible to group members through a spreadsheet.

The second aim is to share knowledge, and provide a forum for discussion, on the forms of free and unfree labour relations, the way they are conceptualized, and their mutual connections. Calls for papers, news about forthcoming events and publications are circulated through the group’s Newsletter and the (forthcoming) ELHN website. The organization of workshops, sessions, conferences, book presentations and other public events is another fundamental instrument of the working group. For an easy way to share abstracts and publications, the use of the platform academia.edu is proposed, by tagging relevant texts with “Free and Unfree Labour”.

The third goal is to act as a “hub” to organize and design new research and collective projects. Further discussion is needed on this point.

The debate on “Free and Unfree Labour” at the First ELHN Conference

At the first ELHN conference, the working group ‘Free and Unfree Labour’ organized two round tables, four thematic sessions and two group meetings. The round tables aimed to open debate on the ‘big’ questions on the use and meaning of the terms ‘free’ and ‘unfree’ in labour relations, and on possible long-term trends and shifts in labour relations. The thematic sessions explored more specific themes, such as the role of spatiality, war, captivity, and precariousness. The sessions of the working group were well attended and it was concluded that the discussions were lively and the content relevant and coherent.

The discussions in the round tables and group meetings indicated that there is both an urgency and opportunity to move forward. The recognition that labour relations are positioned on a gliding scale from (more or less) free to (more or less) unfree labour has opened up a range of questions in relation to categorization, differences, commonalities, connections and functioning of different labour relations in historical contexts. Similar questions arise from the acknowledgment that shifts in labour relations rarely entail linear transitions from one to another labour relation (e.g. from slavery to wage labour), but rather involve shifts from one combination to another combination of (“free” and “unfree”) labour relations. The debates in the working group and elsewhere show the importance of further exploring these questions. They also indicate, however, that the research and discussions have moved into a phase in which concepts and understanding concerning the history of work and labour relations are both ambiguous and shifting. Such ambiguity can be productive and should be used to push our understanding and agenda further. But the round tables, intended to open up the discussion on the ‘big’ issues, also confronted us with some of the problems of such a phase, especially the lack of conceptual and terminological clarity. Strikingly, the name of the working group, specifically the terms ‘free’ and ‘unfree’, recurred as examples of this. Although these terms have been important in creating the insights leading to the current debates, they seem too general to help us further.

In the round table on the meaning of ‘free’ and ‘unfree’ in labour relations, it was pointed out that there are different ideas of freedom (freedom as a divisible and distributable bundle of rights; or freedom as unique and undividable in the sense of a natural condition of self-determination). Such specific ideas have resulted in ‘methodological liberalism’ (privileging absolute freedom as a natural condition) and have clouded the understanding of the gradual positions of more or less free and unfree labour relations, and the processes involved. The argument was made, therefore, that a clearer conceptual framework and more refined terminology was needed.

The second round table focused on the question *Is There a Historical Tendency From Free to Unfree Labour Relations?*, and proved equally thought-provoking. Here the three panelists agreed that multiple forms of coerced labour remained key to capitalist development in the nineteenth century, that is, during and after the processes of the “Industrial revolution” and the abolition of the slave trade and chattel slavery. The contributors also converged on the tendential shift to wage labour after WWI. How then – we might ask ourselves – are we to explain the disturbing presence of coerced labour after WWI? Should we ascribe this uniquely to “states of exceptions”, such as those produced by military conflicts, colonial governmentality, and totalitarian regimes? And how “exceptional” have these circumstances actually been or are? Moreover, how can we interpret the emergence of “new slaveries” (however we define them) in key sectors of global production and distribution?

A third crucial tension characterizing our working group as well as the field of labour history at large was explicitly discussed in the round tables and group meetings. This concerned the dialectics between two different perspectives prevailing in labour history. On the one hand, there is the perspective of ‘labour relations’, which has led to many of the new questions and renewed categorizations on which our discussion builds, but sometimes still seems too disconnected from the specificities of the historical contexts in which labour relations

function. On the other hand, there is the perspective of 'labour' or the 'worker', which is powerful for its historical embeddedness and openness, but also very much fragmented. The need exists to reconnect the perspective of 'labour'/ 'workers' and the perspective of 'labour relations'. In a broader sense, this means reconnecting the field(s) of 'classic' labour history to the field of new or 'global' labour history in order to build and expand on both.

We discussed the future activities of the working group to move the discussion forward by aiming to:

- 1) refine our conceptualization and terminology;
- 2) define more specified themes of study to enable us to scrutinize more closely the historical processes at hand in relation to 'free' and 'unfree' labour; and
- 3) find more concrete angles of study that enable the bridging of the 'classical' and 'global' perspectives.

With these goals in mind, it was proposed that we address more specified themes to examine the functioning of different labour relations. Three such themes recurred during the meetings of the working group:

- **Autonomy/heteronomy**

This is proposed as a potential alternative, and arguably more precise vis-à-vis those of "free"/ "unfree". This entails a move away from the problematic concept of "freedom", and a focus on the worker's individual and collective capacity to influence and control various aspects of his/her work and life;

- **Degrees (or moments) of coercion**

When looking at coercion (or heteronomy), it has been suggested that we address separately (at least) the following three phases: recruitment; the actual working process; and exit. In other words, we may want to address the scale and modes of coercion of a worker in each of this phases (for example, a worker might voluntarily enter a certain labour relation, but then find him/herself being led into circumstances of coercion during the work process, and be denied leaving it).

- **Precarity and control**

Labour precarity is not conflated here with specific forms of contract or service (for example, flex work or chattel slavery), but viewed as the expression of the workers' individual and collective (lack of) control over their labour. In this perspective, precarity relates to the workers' perception of their condition in relation to other workers, the labour market, and the social reproduction of their workforce. As such, the concept may open up opportunities for the exploration of workers' agency across distinct ("free" and "unfree") labour relations.

Three research strategies were suggested to address the above mentioned themes:

- *Contextual*, i.e. understanding labour relations by dealing with specific places or regions for example, the city of Hyderabad or the Mediterranean region), or specific institutions (for example, the army, the plantation, or the workhouses);
- *Taxonomical*, i.e. understanding and differentiating between categories of labour relations; and
- *Interrelational*, i.e. studying entanglements and practices of solidarity (or conflicts) among workers across distinct labour relations in order to reconnect the analysis of labour relations and the perspective of agency.

The debate continues

During the final group meeting it was proposed and agreed that these theoretical, thematic, and methodological issues would be addressed in a workshop of the working group, to be held in October 2016 at the International Institute of Social History (IISH) in Amsterdam. Further information on this event will be provided later.

More information

For feedback on this document and further queries about the ELHN working group “Free and Unfree Labour”, please contact us at: free.unfree.labour@gmail.com

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The Latin America and Caribbean Network on Labour History

by
Rossana Barragán



The Website on [Latin America and Caribbean Network on Labour History](#), hosted by the [International Institute for Social History](#) (IISH), was presented in Buenos Aires during a workshop with Labour Historians organized by [Re-Work \(Berlin\)](#), Red de Historia Social y Cultural de los Mundos del Trabajo (REDHISCO), the Instituto de Altos Estudios Sociales (IDAES), the Universidad de Buenos Aires and the Universidad Nacional de San Martín in March 2015.

The Website aims to connect people on labour history because although we live in an interconnected and globalized world, we remain disconnected in key ways. Flow of information and scholarship between countries and continents are unequal. This website seeks then to:

- present scholarly work from different parts of the world (mainly United States, Europe and Latin America) on labour and workers in Latin America and the Caribbean from the 16th to the 21st century;
- provide information about archives and collections on labour history as well as the history of workers;
- link people and topics in Latin American History that are often not connected, such as slaves of African origin and indigenous workers; free, unfree, and wage labour; labour and migration, women's and child labour;
- connect scholars who speak different languages, for example, Spanish, Portuguese, English and French;
- connect scholars from the North and the South as well as within the South; and
- forge links between labour historians researching different historical periods.

To achieve these goals, the site provides a data base of over 600 bibliographical references on labour in different Latin American countries and the Caribbean world. When the articles are available online, the URL has been placed making easier its availability. The website also provides significant information on archival collections about Labour History. In addition, it has information on recent books, and collections, lyrics about labour and images of labour occupations.

We hope that this site will contribute „to build a community network of scholars who do research on Latin American and Caribbean Labour History from the XVI century until the present”.

“Questions about racialized identities have gained increasing relevance in Argentine historiography”



The following encompasses an interview with Cristiana Schettini and Juan Suriano, members of the Núcleo de Historia Social y Cultural del Mundo de Trabajo (Argentina). The interview was conducted by Christian De Vito.

Which research institutions and which scholars form the group? What are its main activities?

Núcleo de Historia Social y Cultural del Mundo del Trabajo was formed in 2012 at *Instituto de Altos Estudios Sociales de la Universidad Nacional de General San Martín* (IDAES-UNSAM (<http://www.unsam.edu.ar/historia/nucleos/>)). The formalisation of *Núcleo* aims to create a space for sustained academic dialogue between trained and trainee researchers, especially IDAES-UNSAM Masters and PhD History students, dedicated to manifestations and topics related to labour history. *Núcleo* promotes periodic meetings for the discussion of texts, alongside other activities for academic exchange. It is coordinated by Juan Suriano, Director of the Masters and Doctorate Programmes, and Cristiana Schettini.

Do you have contacts with researchers and research institutions in other Latin American countries? Beyond Latin America?

Núcleo is linked to two other simultaneous initiatives: *Red de Historia Social y Cultural de los Mundos del Trabajo de Argentina (REDHISOC Argentina)*, coordinated by Mirta Zaida Lobato and Laura Caruso, which brings together labour historians based in different Argentine institutions since 2013 (<http://redhisocargentina.blogspot.de/2013/06/actividades.html>). The Network fosters an intense exchange of research ideas and experiences among labour historians from different parts of the country. Some members of *Núcleo* also take part in *Red de Historia Social y Cultural de los Mundos del Trabajo, Argentina – Brasil (REDHISOC, Argentina – Brasil)*, which was formed as a forum for academic dialogue between historians from Brazil and Argentina. *REDHISOC Brazil-Argentina* has held periodic workshops since 2010 (four so far). Many of the members of *Núcleo* participate in the conferences promoted by the Brazilian *GT Mundos do Trabalho*, and publish articles in the journal *Mundos do Trabalho*.

Which themes and approaches are prominent in Argentinean and Brazilian social history today? And in Latin America?

The lines of research developed under the scope of *Núcleo* and of the above mentioned Networks vary in topic and period. Historians who participate in *REDHISOC Argentina-Brasil* have an interest in the articulation of social identities, especially class identities, crossed by hierarchies and cultural solidarities, such as gender, race, generation, nation, and region, among others. For example, in the latest workshops of *REDHISOC, Argentina-Brasil*, presentations converged on the following themes: 1. Forms of free and unfree labour (labour market, culture, justice); 2. Workers' sociability and culture (cultural circuits, association, identity, and citizenship); 3. Politics and unions (labour justice, citizenship, elections, and rights).

Beyond the boundaries of these initiatives, exchanges between Argentine and Brazilian researchers also take the form of meetings, dossiers and the organisation of other collaborative enterprises. Examples of recurring themes in recent exchanges are the relations between workers and populism, gender perspective and transnational history (see, for example, the

dossier organised by Paulo Fontes and Nicolás Quiroga, “Repensando los populismos en América Latina, in journal *Nuevo Mundo*, 2013, <http://nuevomundo.revues.org/64832>; the dossier “Perspectiva de género en el mundo del trabajo”, that gathers articles by Brazilian and Argentine female historians in the journal *Mundos do Trabalho* (<https://periodicos.ufsc.br/index.php/mundosdotrabalho/issue/view/1196>); the workshop “Regular y legislar el mundo obrero latinoamericano. Aportes para una historia regional de la OIT”, organised by Laura Caruso and Andrés Stagnaro (<http://www.fahce.unlp.edu.ar/fahce/idihs/eventos/evento.2015-09-04.5381264289>).

In which ways do you think Latin American perspectives on social history contribute to “provincialize” Europe (and therefore question Eurocentrism)? In turn, how far is Latin American social history “methodologically nationalist” (i.e. centred on individual “national” – if not nationalistic – social history)? What are the strategies to overcome this limitation (if you think it exists!)? In particular, in what ways do your research interests as a group deal with non-Argentinean social history or place Argentinean social history in broader trans-national networks and contexts?

Part of the reflections accumulated in the exchanges between Argentine and Brazilian historians, not only in the framework of *REDHISOC-Argentina - Brasil*, but also through informal contacts between various research groups at meetings of Brazilian and Argentine history associations, comprise an interest in overcoming the restrictions inherent in each group's involvement in local historiographical debates in which specific national narratives – including those that take place in Europe, are often addressed at the expense of the formulation of theoretic and empirical problems relevant to the understanding of the historical experience of men and women through the lens of labour history. In other words, the various dialogue initiatives between Brazil and Argentina and among Argentine historians seek to contribute to historical research in either country by means of a consistent and welcome simultaneous exercise of de-familiarisation from local assumptions.

Surely, the centrality of slavery and racial and ethnic issues in Brazilian historiography in connection with the construction of the borders between slave and free labour sets some stimulating problems on the key moments of the narrative on the formation of the working class in Argentina and elsewhere. In fact, questions about racialized identities have gained increasing relevance in the most recent Argentine historiography. In turn, the development of political history in Argentina since 1980 is inspiring in the renewal of Brazilian social history. These diverging paths might converge to further new questions that have been attracting Brazilian historians, especially the link between cultural life and experience of different groups of workers and power relations in formal politics, including electoral contests.

This historiographic production in both countries, anchored in consistent empirical research, particularly since the 1980s, has potential consequences: in strengthening dialogue instances that do not necessarily (or directly) include North American or European research centres. It might constitute a shift in how dialogues with European and North American historiographies are established: more horizontal and productive. At the same time, after an intense exchange of ideas, we understand that European and North American historiographies would also benefit from the effort to de-naturalise their own interpretations in order to avoid ethnocentric prejudices of historiographic production from other regions. Furthermore, as a result of numerous exchanges, we have come to believe that the debate should be broadened to discuss the prevalence of one „lingua franca” and translation policies.

What do you intend by „social history”? Is there a common definition of social history among Núcleo and REDHISOC researchers (explicit or implicit)? What works and historiographic practices (books, projects, etc.) can be considered examples of this way of understanding social history?

Social history as practiced in Argentina is resistant to a broad, shared definition. However, it could be said that its operative definition arises from productive dialogue with other strong local historiographic lines, such as political history, intellectual history and cultural history. We could, perhaps, identify a concern among social historians of labour with the materiality of social relations and with the various forms of production of inequalities as a distinctive feature. The majority of researchers in the field also consider social conflict a crucial part of the historical process. That translates into works with a focus on a range of social groups in relation to subordination and also in approaches centred in times of political organisation and expression.

One of the most shared inspirations comes from English Marxist social history. In particular, the reiterated presence of diverse and renewed readings of the works of E. P. Thompson can be found in the reflections of both the most experienced and junior researchers. Production is vast and cannot be summarised in a paragraph. To that purpose, there are numerous „state of the art” production to be considered. (For example, see Lobato, http://www.scielo.org.ar/scielo.php?script=sci_arttext&pid=S1851-94902008000200003)

Centro de Estudios Históricos de los Trabajadores y las Izquierdas (Center for Historical Studies of Workers and the Left) Buenos Aires, Argentina

by
Hernán Camarero



On 1 July 2016 the Centro de Estudios Históricos de los Trabajadores y las Izquierdas (Center for Historical Studies of Workers and the Left) opened its new office in Buenos Aires, Argentina to promote the coordination of research groups, organize conferences, workshops, guest lectures, , specialized seminars and teacher training courses, as well as encourage outreach activities. It will draw upon the multiple perspectives of social, political, cultural, intellectual and gender history enriched by interdisciplinary and innovative approaches in the social sciences internationally.

The center, directed by Hernán Camarero, is an autonomous and plural institution. It is structured as a civil association, and will forge its route supported by action of its members.. It will promote collaboration and fruitful dialogue with other spaces of intellectual and cultural production, both in Argentina and abroad.

The CEHTI relies on previous achievements, as evidence of an intellectual and cultural enterprise, both possible and necessary. Among them is the publication of the journal *Archivos de historia del movimiento obrero y la izquierda* (since 2012, with uninterrupted biannual issues, already indexed in different databases, such as Latindex, Clase), the consolidation of a book collection “*Archivos. Estudios de Historia del movimiento obrero y la izquierda*” (which includes so far the publication of five books in association with *Imago Mundi*), and the the first conference on the history of the labor movement and the left, which took place in Buenos Aires in June 2015, putting together leading specialists of the field.

The Center welcomes contributions from all who wish to participate and publicity of its activities would be appreciated. The first program of activities will be announced shortly.

Third General Assembly of the International Social History Association



The Third General Assembly of the ISHA was held at the 22st International Congress of Historical Sciences in Jinan, 28 August 2015.

Marcel van der Linden opens the meeting with a historical overview of the ISHA. This grew out of the Comité pour l'histoire des mouvements sociaux. It was restarted by 5 European institutes as ISHC and re-christened ISHA in 2005. It has the right to propose panels at the conferences of IEHA and CISH, and has done so since 2003. Recently this has led to a panel on Capitalism in Stellenbosch, on the history of money in Kyoto and the sessions on the present conference. Thanks to the efforts of Bela Tomka, the ISHA now also produces a digital newsletter for members.

Bela Tomka discusses the newsletter. Bottlenecks are the fact that there is no native speaker of English available on a regular basis. The offer of contributions is a bit ad hoc. The situation could improve if a network of international correspondents could be established.

Lex Heerma van Voss discusses the financial situation. The ISHA needs about € 1.000 per year for the membership dues to IEHA and CISH. He has failed in the past years in reviving the practice of asking members to pay their dues, for which he apologizes. Marcel van der Linden adds that the fee is € 300 per year for institutions, € 15 for students and € 25 for other individuals. Lex Heerma van Voss proposes to stop collecting individual fees, as the contributions of a small number of institutions is enough to pay ISHA's expenses and the income of individual memberships does not outweigh the effort necessary to collect them. Marcel van der Linden remarks that some individuals prefer to have a paid membership, and it creates commitment. It is therefore decided to keep the paid membership. To limit bank charges a multi-year membership will be offered.

The meeting discusses at some length the question whether ISHA should organize more activities that the session it can claim at the IEHA and CISH conferences. Jürgen Kocka proposes organizing a conference on terminology with the Leipzig group. Amarjit Kaur names several Australian and Asian conferences ISHA can link up to. Mechtild Leutner proposed that ISHA contact the main groups in China, among which are CASS, Nanjing University and Tianjin University. To prepare such contacts Jürgen Kocka, Dirk Hoerder and Mechtild Leutner will arrange a meeting in Berlin.

The meeting proceeds with a discussion on the possibilities to increase our presence at the IEHA and CISH conferences.

For the CISH Jürgen Kocka suggests proposing sessions for the main panel. Leonid Borodkin suggests proposing a major theme. Lex Heerma van Voss points to the practice of the Historical demographers and Women Historians, who organize a large number of session as IAO, and thus make the conference as a whole more attractive for their field. It is decided to offer the possibility for all these things. If we stimulate social historians to propose session for the main programme, the ISHA sessions can act as a safety net in the case the sessions are not accepted for the main programme.

Composition of the Board. Dirk Hoerder and Lex Heerma van Voss step down. Marcel van der Linden yields to a plea from the meeting and accepts re-election as president. Bela Tomka as editor is re-elected. Christian de Vito is elected as vice-president. Amarjit Kaur is confirmed as regional representative Asia-Pacific. Lex Heerma van Voss will remain acting treasurer until a new treasurer has accepted or the IISG has accepted to administer the finances.

A team of regional correspondents will be formed to assist the editor of the Newsletter in collecting news and conference reports and to suggest conference that the ISHA may co-sponsor. The board will look for members in Japan, India, sub-Saharan Africa, the Philippines (Concepcion Lagos is suggested or will suggest colleagues), Latin America and Australia (Nathan Weiss is suggested).

ISHA Newsletter

The Newsletter is the publication of the International Social History Association

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Submissions are welcome including brief notes, such as reports on conferences; personal accounts related to ISHA issues; announcements of forthcoming conferences and meetings on issues related to ISHA; readers' comments sharing your reactions to and thoughts about materials published in the Newsletter. All documents need to be formatted using Microsoft Word (.doc). Please send all manuscripts as an e-mail attachment to the editor.

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