Theorizing societalization across borders: Globality, transnationality, postcoloniality

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Abstract
The editorial summarizes the main conceptual and epistemological challenges of theorizing on society across borders. Its particular aim is to initiate the dialogue between theories of society and cross-border studies that address global, transnational and postcolonial relations. In essence, this special issue addresses four interrelated concerns of studying societal processes across borders. The first of these concerns is prompted by a decades-old critique of methodological nationalism. The second concern addresses the question of how can ‘society’ and the boundaries of ‘societalization’ be conceptualized, if global, transnational and postcolonial processes straddle the boundaries of nation-states? The third concern relates to the fact that sociological ‘grand’ theories have been criticized for failing to analyze recent developments of societies on a meso- and micro-level. Fourthly, a conversation between social theory and cross-border studies is also challenged by epistemic inequalities. Therefore, theories of society should be able...
to take into account not only the ‘grand scale’ of societal contexts and societal changes but also the positionality of the theorizing subject within global asymmetries of power.

**Keywords**
Cross-border studies, epistemic inequalities, globality, postcoloniality, theories of society, transnationality

This special issue offers an urgently needed conversation between theories of society and cross-border studies that focus on global, transnational and postcolonial relations. Theories of society have tended to focus primarily on ‘the grand context’ of the social and to describe ‘society’ as the largest possible unit of analysis. Calls for viewing the entire capitalist world-economy as a unit of analysis remained a minority position (Wallerstein, 1979). It was only around the turn of the millennium that large-scale and long-term economic, political and technological transformations across the globe put theories of society under increasing pressure: from the perspective of cross-border studies, many current theories of society are seen as neglecting processes of globalization, transnationalization and postcolonial entanglements (Bauman, 1998; Giddens, 1990; Glick Schiller, 2009; Mintz, 1998). Moreover, when dealing with current global and regional transformations, prevalent Western approaches to ‘society’ reproduce the Eurocentric and Occidentalist thinking that considers Western European historical social formations as the norm (Boatcă, 2015).

Addressing a conversation between theories of society and cross-border studies, this special issue speaks to four interrelated concerns. The first of these concerns is prompted by a decades-old critique of methodological nationalism. Many scholars have criticized the prevalent theorization of society as implicitly bounded by the nation-state (Amelina et al., 2012; Beck and Sznaider, 2006; Wimmer and Glick Schiller, 2003). Yet addressing the limitations of these perspectives is still not the prevalent approach. Of course, several important theories of society are global in scope — from Karl Marx’s global political economy in *Workers of the World, Unite!* to Immanuel Wallerstein’s world-systems analysis, to Niklas Luhmann’s world society. But the common practice of sociological theorizing still is to equate the analytical categories of ‘society’ and of ‘the nation-state’. This is apparent even with regard to research inspired by world-systems and world society theories: rather than considering a range of various cross-border relations, globalization research favors country comparisons or ‘international’ perspectives (that is, comparisons between nation-states).

Answering the critique of methodological nationalism results in a second concern: if we take the argument of global and cross-border studies seriously — that global, transnational and postcolonial processes straddle the boundaries of nation-states — how can ‘society’ and the boundaries of ‘societalization’ be conceptualized? This challenge concerns a major question of sociological theory-building: Can and should the concept of society encompass differentiated fields or systems, which would turn it into a world-society concept by default (e.g., consider Luhmann’s and even newer Bourdieusian...
approaches), or should we study one world-system that is defined by a capitalist division of labor (as in the case of Wallerstein’s, Samir Amin’s and AG Frank’s approaches)? How should we envision processes of societalization that may or may not overlap with national and other types of politically bounded and territorially segmented frameworks (Urry, 2000; Walby, 2009)? These queries turn the relationship between society as the ‘sum’ of social relations and complex societal differentiations into a core element of the discipline.

The long-overdue dialogue between major schools of theoretical thought is, thirdly, burdened by the fact that ‘grand’ theories have been criticized for failing to live up to their promise. Ideally, theories such as those offered by Wallerstein, Parsons and Luhmann can describe and analyze long-term historical developments of society on an abstract level. As general, ‘grand’ theories of society, they (claim to) systematize empirical findings within a framework of coherent concepts. In so doing, however, they largely fail to address, analyze and understand recent developments of societies on a meso- and micro-level. Within these ‘grand theories’, Parsons was, for example, followed by Alexander’s neo-functionalism (1992). Alexander, however, opted to ‘do’ theory by focusing on smaller historical developments in many individual studies. Thus, the challenges posed by methodological nationalism are part of more general and foundational problems of theories of society. So-called grand theories focus on structures and systems; global and cross-border studies deal more with processes and social change.

Fourthly, a conversation between social theory and global and cross-border studies is also challenged by epistemic inequalities (Patel, 2006). The ‘grand theories’ from the Global North claim to produce research driven by objective analysis rather than critical research with a political agenda. But the canon of ‘classic’ social theories emerged in a particular historical situation that is inscribed onto the theoretical premises and the explanatory potential of these theories. The colonial epistemology underlying both classic and many contemporary theories continues to reproduce non-European social formations as ‘simple’ or ‘traditional societies’ in contrast to the complex and modern society of the West (Mbembe, 2001). A reflection on the epistemic power of these social theories is needed. Theories of society should be able to take into account not only the ‘grand scale’ of societal contexts and societal changes but also the positionality of the theorizing subject within global asymmetries of power.

This positionality is more complex than a mere North–South divide (Hanafi, 2020; Mbembe, 2001). Within globally hegemonic Europe, Eastern European, migrant and racialized scholars do, for example, occupy a marginalized position (Boatcă, 2015). Well-funded German-language theorists come from ‘the’ classical colonizing tradition. But today, German- and other ‘foreign’-language research is neither read nor recognized in the predominantly English academic discourse (Medina, 2014). In contrast, scholars in the Global South are underfunded, but in some cases situated – not by choice, but in terms of visibility – to their advantage, in postcolonial English-language discourse. The dialogue in this special issue benefits from the fact that its authors speak from different positions in the complex web of global epistemic inequalities. Theories of society are enriched through reflections on the hegemonic knowledge and symbolic violence that these distinct positions generate. Such reflections need conceptual tools that can address the Occidentalism and Eurocentrism in most theorizations of society. But they also
benefit from the insights generated by dialogue between theoretical positions – the kind of dialogue to which this special issue aspires.

The concerns discussed above are well known. In the past few years, they have been the focus of several critiques as well as attempts to retrieve previously excluded contributions to social theory and to offer a decolonized canon (Connell, 2007; de Sousa Santos, 2015; Gutiérrez Rodríguez et al., 2010; Keim et al., 2016). Yet they are rarely addressed through dialogue between schools of thought, especially where fundamental questions of the discipline are concerned. Is it possible and meaningful to ‘translate’ concepts that have evolved separately in more than one theoretical tradition? Consistency of arguments and concepts is, after all, a core goal of theorizing. Can established social theories be reformed, and are their proponents willing to engage in (and with) criticism? Or does a critique of Eurocentrism and Occidentalism in social theory mean that other disciplines or critical theories should succeed and replace sociological classics? If so, what would a decolonized canon look like? Global and cross-border sociologies are often driven by critical and public sociologists (Burawoy, 2005; Lessenich, 2019) who engage with capitalism, neoliberalism and global inequalities (Boatcă, 2015; Girioux, 2004; Korzeniewicz and Moran, 2009; Walby, 2009; Weiß, 2017, 2018). Sociology’s canonized classics, on the other hand, wrote in a historical context – Northern industrialization – that was as conflictual as our times, yet was neither treated as a particular context nor assumed as the epistemic standpoint for the social theory produced. Instead, the specific trajectory that linked industrialization, class conflict and proletarianization in the Northwest of Europe was theorized as universal and decoupled from the global context of colonization, imperialism, enslaved labor, extractive plantation economies and the migration of millions of Europeans to the New World. Ironically, at the same time that Northwestern Europe’s historical experience was becoming the sociological norm, Max Weber famously proclaimed that sociology should abstain from normative interpretations. As Stefan Jonsson recently remarked, to this day, issues of migration, colonialism and political protest ‘fit poorly into the “model society” that the social sciences were built to analyse and explain’ (2020: 205).

So, what is society? How can society be thought about beyond the frame of the nation-state? Should classical sociological theories be set aside because they promote notions of modern statehood that neglect transnational phenomena and are invested in colonizing projects? Can the heterogeneity of epistemic inequalities, cross-border relations and societalization processes be thought together and, if so, how? This special issue is dedicated to overcoming deadlock between these extremes.

Arguably, one of the longest theoretical traditions – and certainly one of the most global in scope – is the one that has explored the rethinking of foundational concepts from peripheral locations in the Global South and the European East. In this special issue, we engage with global, transnational, postcolonial and decolonial approaches to such rethinking in order to revisit core concepts, such as the ‘sociological perspective’ itself or to position ‘Europe’ otherwise and to thus recreate our theoretical vocabulary. We suggest alternative avenues for such rethinking. In terms of ‘grand theory’, we explore the contribution of differentiation theories. In our view, these approaches could address global and cross-border phenomena while combining classical theoretical arguments with contemporary innovations. Finally, we see potential in mid-range theorizing to replace clear-cut
dualism with ‘complexity, nuance, precision, and caution towards any sweeping a-historically and apolitically universalized concepts that deflect attention from the historical-structural heterogeneity of our world’, as Hanafi (2020: 14) aptly puts it. In the last section of this introduction, we engage with the possibilities presented by empiricizing cross-border phenomena and processes as a way of informing the rethinking of sociological concepts.

Revisiting foundational concepts: The challenge of standpoints

Rethinking core sociological concepts from the margins – of visible global academia or of the hegemonic positions in the capitalist world-economy – yields a sociology with a different study object and a different outlook from that of Westernized sociological discourse.

In past decades, it has been in particular theories of postcoloniality and decoloniality that have denounced the abstract universalism of Enlightenment thought informing classical and contemporary theories of society. As Barnor Hesse notes, the idea of a universal history subsuming the whole of humankind under one ‘project of (Western) modernity’ with identical stages and goals provided the legitimating rhetoric for Europe’s colonial expansion. At the same time, upholding European superiority in relation to the New World required two conceptual moves: translating the negative experience of otherness into the positive idea of ‘discovery’ and turning the European colonial relation into a ‘blind spot’ in sociological theory (Hesse, 2007: 657). According to Aníbal Quijano, one of the leading authors of decolonial thought, such Eurocentrism was propagated with the help of two foundational myths of the European Enlightenment: evolutionism, which mandated a sequence of stages leading up to a stylized Western model of capitalist modernity, and dualism, which traced differences between Europeans and non-Europeans back to insuperable natural categories such as primitive/civilized, irrational/rational, traditional/modern (Quijano, 2000). These two myths entered the conceptualization of sociology as the two major cleavages characterizing modern society; it was the task of a discipline concerned with this new form of society to analyze and describe these cleavages. Temporally, the epochal break accounted for the transition from agrarian tradition to industrial modernity, a process consequently seen as evolutionary. Spatially, it was cultural differences that explained the features that distinguished Western European societies from the ‘rest of the world’, according to the above-mentioned dual pattern. Within the intellectual division of labor established among the social sciences in the nineteenth century, the task of sociology, and the primary intellectual concern of canonized classics like Marx and Weber, was to explain why it had been the Western world that had pioneered modernity, capitalism, or both. The task of dealing with ‘Oriental’ and otherwise non-Western societies fell to anthropology and Oriental studies, which were concerned with why these parts of the world were not, or could not, become modern (Patel, 2006; Randeria, 1999; Wallerstein and Gulbenkian, 1996: 25). Such questions are essential for the current self-understanding of sociology as a discipline. This is why we also need a historical reconstruction of the disciplinary pathways of sociology in the so-called peripheral contexts. In this special issue Sujata Patel shows how binaries, stemming from
the generalization of cultural difference as a framework to read the West and ‘the Rest’, are reproduced both in the European vs. Indian social science, and in the division of labor between ‘Indian’ sociology and anthropology. Relational perspectives on global inequalities focus instead on processes of co-constituency of Europe and its Others. Further in this issue, Boatcă rethinks Europe as a sociological category from what she terms ‘forgotten Europes’ – Europe’s remaining colonial possessions in the Caribbean and their corresponding geographical referent, Caribbean Europe. A relational perspective shifts the focus of analysis from developments within Europe to the entangled realities engendered through colonial, imperial and postsocialist rule. Instead of studying endogenous causalities of independent nation-states, we need systematic analysis of the transformations wrought both in modern European states and in their former or present-day colonies on the one hand, and in the postsocialist contexts on the other (Connell, 1997; Conrad and Randeria, 2002). This also means that the state monopoly on the use of violence needs to be conceptually and analytically paired with the perpetration of violence by modern European states in the colonies and in other non-European and non-Western settings at the same time that European societies were being gradually pacified (Connell, 1997; Knöbl, 2012). Rather than an irrational counterpart to the rationality being developed in the European metropoles, violence was a prerequisite for both the European colonial conquest and the metropolitan exploitation of the colonies’ resources in the construction of an affluent European modernity.

**Differentiation theoretical variations of grand theories**

Amongst the classical canon of theories that emerged in Northern sociology, we see a particular differentiation theoretical discourse as a promising answer to the concerns of global and cross-border studies. Heterogeneous concepts ranging from world-societal systems to the institutional domain-theories or the transnational professional field-approaches hearken back to differentiation theoretical arguments first put forward by Simmel (1989) and Durkheim (2013). In these theoretical schools, modern society is seen as a nexus of domains such as the economy, politics, science, family, law, art, education, mass media – domains that are differentiated by their content and function. This, for example, enables Sylvia Walby (2009, and in this issue) to see private and state-induced violence as a core institutional domain.

Differentiation theorists often struggle to approach social inequality because they think of social inequalities as secondary derivations of the dominant structures of differentiation. In their reading, modern class inequalities result from inclusion and exclusion processes in the domains of economy and education. This differs fundamentally from the tradition of theories of society that reaches back to Marx and Marxism, where economic inequalities in the form of classes are central for understanding the characteristics of modern societies, and all other structures and functions of society are subordinated to the political economy. Until today, due to this apparent incompatibility, differentiation theories and Marxist approaches to sociology have developed almost independently, and without dialogue.

Nonetheless, both schools have recently developed options for understanding society beyond the nation-state. A prominent German systems theorist, Niklas Luhmann (2013:
Amelina et al., 283–289), argues that politics and most other systems of world-society are achieving a global scope. Nation-states are internal structures of just one content-specific system: politics. In the Marxist tradition, Wallerstein developed a fully-fledged world-systems analysis early on. The theoretical challenge of combining both perspectives on society would require resolving the contradiction between the core concepts of the two approaches and studying cross-border processes at the same time. One way to approach this problem is found in Pierre Bourdieu’s theory of social fields – a focus of many contributions in the 2018 Bielefeld conference. In contrast to more recent developments in a general sociological theory of fields (Fligstein and McAdam, 2012), Bourdieu’s fields are structures of inequalities in which professional actors struggle to attain the capital needed to maintain or to change their position. According to Bourdieu, social fields are understood as micro-universes, which are primarily differentiated by specific ‘rules of the game’, and forms of capital, which are specific to a particular field. The struggles of these professional actors are at the same time struggles about the definition of the legitimate practices and the legitimate actors of a field (Bourdieu, 1996).

This approach could also be used to conceptualize sociologists’ struggle to attain general acceptance for their specific version of an adequate theory of society (Bourdieu, 2004). Here, Northern sociologists, with their well-established theories of society modeled on structures of Western society, are in a structurally unequal competition with sociologists from the Global South, who have long been questioning those theories as a kind of ideology of former colonizing powers (for a similar analysis of the field of art, see Buchholz, 2008, 2016). This somewhat provocative exemplification of field theory also underlines the possibility that the theory of fields can capture fields as transnational professional domains.

Transnational approaches to field theory consider the continued relevance of the nation-state because field theorists expect refractions of the ‘pure logic’ of the rules of a field by external powers, such as the nation-state. The ‘pure logic’ of a field consists of the rules of the production of field-specific practices. Practices that follow those rules are imputed to the field as well as to actors who act in the expected ways. Nation-states refract the logic of fields through their administrative logic, which gives relative value to different forms of capital within the territory of a nation-state. For example, state policies on economy or culture impact on the relative value of cultural capital in relation to economic capital, and vice versa. Thus, for field theory, the nation-state continues to be the nexus of all differentiated autonomous social fields in a territorial perspective, which is called the field of power (Bongaerts, 2008; Wacquant, 2004).

What constitutes a field of power is an empirical question (Go and Krause, 2016), a methodological approach that makes it possible to understand the ways in which empires transformed (or did not transform) into nation-states (Go, 2008) or into study fields as transnational domains. The logics of fields goes beyond state boundaries, and research must show whether and to what extent non-state actors gain more power than the state on a transnational level. An example is Richard Münch’s analysis of the increasing power of private consulting agencies such as McKinsey within the processes of transnationalization of the field of education (Münch, 2009). In sum, field theories address the contradiction between differentiation theories and Marxism in two ways. Firstly, inequalities are seen as multiple and as specific for each field. Secondly, Bourdieu’s field theory can see
the emergence of differentiation theories and Marxism as symptomatic of struggles within the field of sociology.

In this special issue, the potential of differentiation theories is further explored. Sylvia Walby draws on the theory of complex systems, which enables her to overcome the division between theories that focus on the differentiation of institutions and an analysis of inequalities in the Marxist and gender studies traditions. Anja Weiß (in this issue) follows Walby’s lead to study both institutional domains and regimes of inequality, but she combines differentiation theories of various provenance (Simmel, Luhmann, Bourdieu) to address global and cross-border social contexts and the various ways in which these contexts relate to actors.

**Empiricizing the dialogue between theories of society and cross-border studies**

The uniqueness of the articles collected for this special issue is that they also identify empirical and methodological pathways for how to research processes of cross-border societalization, while maintaining critical-reflexive standpoints. Pleading for flexible theoretical and methodological tools, most of the articles call for consideration of multiple researchers’ standpoints within the global asymmetric field of scientific knowledge production. Moreover, contributions of this special issue suggest that grand theories move away from explaining all social phenomena in a generalizing way towards paying more attention to historical context and meso- and micro-level processes. Yet a renewed sensitivity to small-scale and entangled historical developments can also inspire an inductive way of theorizing society and processes of societalization. This interest in the empirical goes hand in hand with the critique of epistemic hegemony, which is best expanded based on concrete empirical field research, since only the latter will allow us to seriously revise classical concepts of sociology, such as inequality, class or individualization.

Building on this notion of empirical sensitivity, Anna Amelina (in this issue) proposes the concept of cross-border assemblage(s) to study cross-border relations of power and inequality in the context of both postcolonial and postsocialist realms. While Amelina advocates a concept of assemblage, Kathya Araujo (in this issue) uses her empirical research in Chile to propose a reconceptualization of core sociological concepts such as individualization, secularization and modernization. Araujo’s argument is that, although high levels of abstraction give social theory the appearance of generalizability, the concepts nonetheless are derived from a specific spatial and historical experience by a specific group of theorists and researchers, namely those in and from the ‘Global North’.

Summing up, the critiques of methodological nationalism and of epistemic hegemony of classical theories of society are related. Thus, some of the contributions in this collection call for a radical reconceptualization of core sociological concepts. Others opt for more moderate adjustments, by, for instance, revisiting theories of differentiation in order to analyze global and hybrid processes of societal change. All in all, the necessity to address cross-border and global linkages challenges those sociological theories that approach ‘society’ in the singular, but stimulates those theories, which approach ‘society’ in plural – as multidimensional, entangled and transversal processes of societalization.

In conclusion, if dialogues between theories are arguably always a good idea, we found this particular dialogue between theories of society and studies of global,
transnational and postcolonial relations imperative, and dedicating an issue to it, urgent. At stake in making the dialogue work is not so much a common definition of ‘society’, but how we want to do sociology. If theories which make their positionality or political agenda explicit are dismissed as not being sociology, our discipline will not account for the experience of the majority of the world’s social actors, their mobility, and their struggles. If, on the other hand, epistemic critique is not filled with empirical content, it will remain aloof from the very experiences to which it tried to draw attention. The borders to be crossed in theorizing about societalization in the twenty-first century are physical as well as intellectual.

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Résumé

L’éditorial résume les principaux défis conceptuels et épistémologiques de la théorisation de la société d’un pays à l’autre. L’objectif est d’initier le dialogue entre
les théories de la société et les études transfrontalières qui traitent des relations mondiales, transnationales et postcoloniales. En substance, le numéro aborde quatre préoccupations interdépendantes liées à l’étude des phénomènes sociétaux d’un pays à l’autre. La première de ces préoccupations relève d’une critique, vieille de plusieurs décennies, du nationalisme méthodologique. La deuxième concerne la question de savoir comment conceptualiser la « société » et les limites de la « sociétalisation » si les processus mondiaux, transnationaux et postcoloniaux débordent les frontières des États-nations. La troisième concerne le fait que les « grandes » théories sociologiques ont été critiquées pour ne pas avoir analysé les évolutions récentes des sociétés à un niveau méso et micro. Enfin, le dialogue entre théorie sociale et études transfrontalières est également confronté aux inégalités épistémiques. C’est pourquoi les théories de la société devraient pouvoir prendre en compte non seulement la « grande échelle » des contextes et changements sociétaux, mais aussi la position du sujet théorisant dans les asymétries de pouvoir mondiales.

Mots-clés
Etudes transfrontalières, inégalités épistémiques, mondialité, postcolonialité, théories de la société, transnationalité

Resumen
El editorial resume los principales desafíos conceptuales y epistemológicos de teorizar sobre la sociedad en diferentes países. Su objetivo concreto es iniciar el diálogo entre las teorías de la sociedad y los estudios internacionales que abordan las relaciones globales, transnationales y poscoloniales. Esencialmente, el volumen aborda cuatro preocupaciones interrelacionadas al estudiar los procesos sociales en diferentes países. La primera de estas preocupaciones surge de una crítica de décadas al nacionalismo metodológico. La segunda preocupación aborda la cuestión de cómo se puede conceptualizar la ‘sociedad’ y los límites de la ‘socialización’ si los procesos globales, transnationales y poscoloniales traspasan los límites de los Estados-nación. La tercera preocupación se relaciona con el hecho de que las ‘grandes’ teorías sociológicas han sido criticadas por no analizar los cambios recientes de las sociedades a nivel meso y micro. En cuarto lugar, el diálogo entre la teoría social y los estudios internacionales también se ve desafiado por las desigualdades epistémicas. Por lo tanto, las teorías de la sociedad deberían poder tener en cuenta no solo la ‘gran escala’ de los contextos sociales y los cambios sociales, sino también la posición del sujeto teorizante dentro de las asimetrías de poder globales.

Palabras clave
Desigualdades epistémicas, estudios internacionales, globalidad, poscolonialidad, teorías de la sociedad, transnationalidad