

**RACIAL AND ETHNIC RELATIONS IN THE MODERN WORLD-SYSTEM:
A COMPARATIVE ANALYSIS OF
PORTUGUESE INFLUENCE IN ANGOLA AND BRAZIL**

By Kevin H. Ellsworth

Arizona State University

For Presentation at the 1999 International Studies Assoc. Conference

February 19, 1999

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Although Portugal now occupies the outer fringe of the capitalist world-system's core, it once held a central hegemonic position. At a time when the world's racial and ethnic character was being radically redefined, Portugal orchestrated a mass migration of slaves and Europeans which permanently altered the character of its colonial possessions. It also set a pattern to be followed by several subsequent European hegemonies: Spain, France, and England.

Portugal's colonial history provides a particularly illuminating case of Europe's impact on the racial and ethnic character of the capitalist world-system. Having been the first to engage in this racial-demographic engineering, Portugal's colonial history provides an advantageous view across five centuries of Portugal's actions and their effects. Consequently, it provides great insight into the world-system's racial and ethnic dynamics and discloses an important element of Western European politics which far outlived any impact the countries' policies had within their own borders (Portugal today bears virtually no ethnic imprint of its actions). Portuguese history reveals how Europe in general exercised its political and economic might to dramatically alter the world-system's peripheral and semiperipheral ethnic composition and the nature of their ethnic and racial relations. Finally, by comparing two of Portugal's colonies, Angola and Brazil, in the context of the greater African and Latin American regions, we can discover how the core's actions differ greatly in their effects on ethnic relations in the world-system's periphery compared with its semi-periphery.

The prevalence and severity of ethnic conflict varies greatly across the capitalist world-system's three political-economic zones. At the world-system's core, Western Europe is almost completely free of large-scale, militarized ethnic conflict. On the outer fringe of the world-system's periphery, Africa bears the brunt of the damage. Latin America at the world-system's semi-periphery has its share of low-level conflict but has escaped Africa's large-scale, militarized ethnic wars. That Europe is largely untouched in recent history is not unexpected (Gurr 1993, 139-172), but the comparison between Africa and Latin America raises many crucial questions.

Despite a long and troubled history of military confrontation and racial oppression, Latin America has somehow avoided the ethnically stratified conflicts that have proven to be so long, so costly, and so resistant to peaceful settlement as those in Africa. In fact, only three militarized, ethnically stratified conflicts have worked their way into the 1990s¹ and the two most serious now seem to have subsided. Furthermore, none of these three has reached nearly the level of violence of ethnic conflicts in Ethiopia, Sudan, or Angola.

The factors enabling and inciting this devastating conflict are on one hand as plentiful as those inducing 'peace' on the other. In fact, the recent avalanche of ethnic and racial literature has demonstrated that ethnic conflict and ethnic peace are always overdetermined, "caused" simultaneously by so many variables that without a guiding paradigm it is very difficult to make any sense of things at all. Cold War ideology, international manipulation, colonialism, leadership, geography, military capabilities, environmental and demographic stress, political and economic inequality and oppression, and cultural predispositions and discriminations all come into play.

Few scholars, however, attempt to fully consider this breadth of variables, and those who do often fail to integrate these disparate variables into a theoretically cohesive framework. None has attempted to apply world-systems theory to achieve this unity,² despite its potential. This paper attempts to fill that void. It will position Brazil's current 'peace' and Angola's violence within the theoretical context of the capitalist world-system. Such an application will aid in discovering a more holistic and theoretically cohesive explanation of these differences, and by doing so will also serve to refine world-system theory's conceptualizations of race and ethnicity.

I will address this issue with a two-step process. First, I will very briefly consider the more traditional literature on ethnic/racial conflict and present a few statistical findings that address this literature.

¹ Minorities at Risk mentions only the UNRG in Guatemala, the Zapatista in Mexico, and the Amazonian Indians in Brazil. Other candidates are, however, also mentioned in the academic literature including Peru (Brennan 1989, Brysk and Wise 1995, and Claudillo and Alicia 1992) Bolivia (Brysk and Wise 1995), and Guyana (Spackman 1973, Premdas 1992, and Premdas 1994).

² The closest attempt was perhaps Wallerstein's own in "Luanda is Madrid" (1976) but even this is more descriptive than theory-driven.

My statistical presentation will utilize data from the University of Maryland's Minorities at Risk Project headed by Ted Gurr, who recently completed the Phase III data set representing ethnic groups and their conflicts throughout the world. Made public in the summer of 1997, the data set of 266 cases and almost 500 variables enables a broad-based study of many of the conditions enabling ethnic conflict. On many issues the data set is limited by the inherent limits of quantitative representation; it is unable to consider the role of leadership and instrumental ethnicity, the finer aspects of social-psychological identity, and the impact of cultural elements. Nevertheless, because of the data set's breadth of variables and the ease with which these variables can be compared across hundreds of cases, a statistical comparison is a productive start.

Second, I will present the relevant world-system literature, attempt to distill from it a cohesive conceptualization of racial and ethnic conflict, and then apply that theory to each of the world-system's strata--the core's (Portugal's) effect of the semi-periphery (Brazil) and the periphery (Angola).

TRADITIONAL APPROACHES TO ETHNIC CONFLICT

The literature on ethnic and racial conflict is massive and it is growing at an accelerated pace. A full presentation and analysis of it here is not possible (nor desirable given space constraints), but a brief summary is. The literature descends from the vast fields of international relations, comparative politics, sociology, anthropology, and social psychology, but regardless of its academic origin, it tends to cluster around a few variables and the theoretical paradigms that grant each variable-cluster primacy.

Some follow the realist tradition and stress *geopolitical-military* conditions (Lake and Rothchild 1996, and Posen 1993). Some focus on the *instrumental* role of ethnicity as a tool to be manipulated by opportunist elite (Gagnon 1994/5 and Brown 1993). Others focus on a group of *psychology/sociology or identity* factors (Berreman 1991, Nagel 1986, Gaasholt 1989, Douglass 1988, Royce 1982, Wedge 1986, Ross 1985, Azar 1986, and Bochner 1980). Some stress *economic* factors from both Marxist and nonmarxist paradigms (Bonacich 1980, Esman 1990, Wilson 1978, Samarasinghe and Coughlan 1991, and Despres 1975). Still others stress *historical* (typically colonial) factors (Melville and Melville 1971, Smith 1978, and Wolf 1982). Finally, a host of others assemble bits and pieces from several of the above-mentioned clusters (Gurr 1993, Kelman 1992, Ryan 1990, Brown 1993, and Horowitz 1985).

Loosely subjecting these theoretical approaches to the data reveal some fascinating patterns. To tell the end of the story first, the data confirm the lack reliable of militarized ethnic conflict in both Western Europe³ and Latin America where it is low and declining (Figures 1 and 2). These conditions stand in sharp contrast when compared directly with the magnitude of ethnic

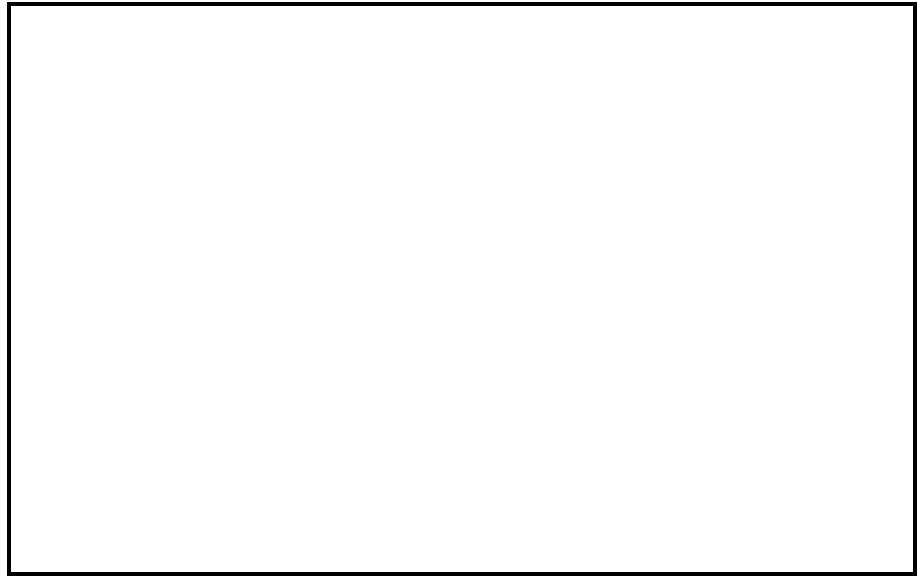


Figure 1. Trends in Minority Conflict, 1945-89 Western Democracies and Japan (Gurr 1993, 102)



Figure 2. Trends in Minority Conflict, 1945-89 Latin America (Gurr 1993, 107)

³ I begin with continental comparisons (Western Europe, Latin America, and Africa) in Figures 1, 2, and 3 and Table 1 to bridge the specificity gap between the very broad world-system strata (core, semi-periphery, and periphery) and the very specific cases (Portugal, Brazil, and Angola) to receive more attention later.

conflicts in Africa (Figure 3).⁴

As one looks to the data (Table 1 on the following page) for potential explanations of these contrasts, many more questions are raised than are answered. First, the data reaffirm that on average Africa suffers a great deal more militarized

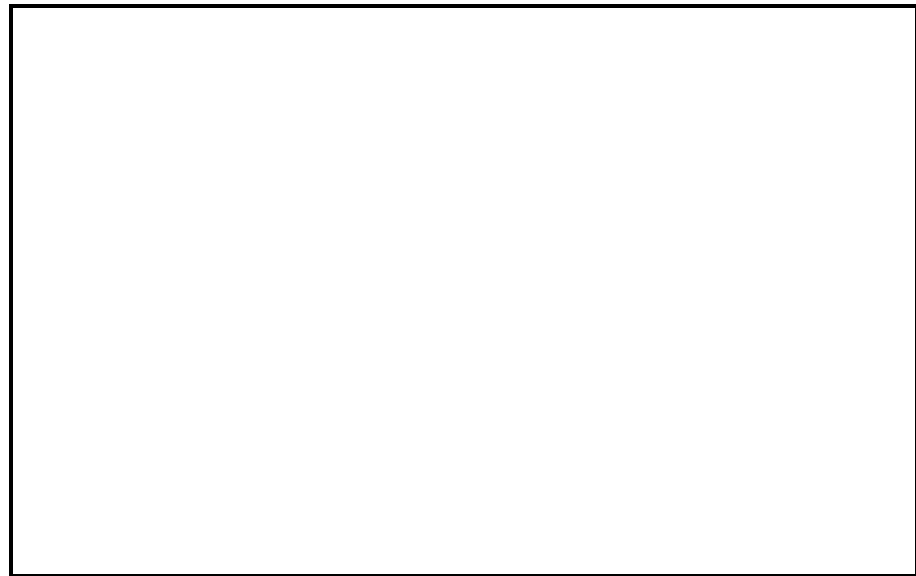


Figure 1. Trends in Minority Conflict, 1945-89 Africa South of the Sahara (Gurr 1993, 106)

ethnic conflict (with a mean value of 2.2 indicating slightly more conflict on average than political terrorism) than do Western Europe and Latin America (each with a mean value of 0.7 indicating less conflict on average than political banditry). What causes this disparity is a much thornier issue. Looking for the causal factors upon which conflict depends, one finds an array of seemingly contradictory indicators.

Table 1 considers several of the variable clusters mentioned in the literature review above. The dependent variable, Rebellion, represents the mean degree of violence in the ethnic relations of each region. Each independent variable is marked with a "+" or "-" sign to indicate the expected direction of correlation with the dependent rebellion. The numbers following each variable represent the mean measure of that variable in each region--the average conditions and characteristics of all minority groups in that region. The bold numbers represent the highest score of the three regions. Altogether they tell a very mixed story.

⁴ The difference would appear further magnified if these three graphs were equal in scale. In order to fit the abundance of African conflict into Figure 3, it was scaled to one half that of the Figure 2.

Table 1. Comparing Conditions Across the Capitalist World -System⁵

		Periphery Africa	Semi-Periphery Latin America	Core Europe
Independent Variable				
Rebellion		2.2	0.7	0.7
Dependent Variable Clusters				
Economic variables				
Economic Disadvantage	(+)	2.6	6.9	3.6
Economic Discrimination	(+)	0.9	2.5	1.5
GDP per Capita**	(-)	1322	4535	16195
Political variables				
Political Disadvantage	(+)	3.0	4.0	2.1
Political Discrimination	(+)	2.1	2.4	0.9
Democracy***	(-)	0.8	5.9	9.7
Identity variables				
Ethnic Differentials	(+)	4.9	6.8	5.0
Racial Differences	(+)	0.8	2.0	1.1
Cultural variables				
Cultural Identity Strength	(+)	4.1	6.7	5.8
Cultural Differences	(+)	2.1	3.1	2.8
Cultural Restrictions	(+)	0.4	1.5	0.3
Ecological and Demographic variables				
Demographic Stress	(+)	0.4	2.4	2.0
Ecological Stress	(+)	0.8	2.6	0.1
Dispossession from Land	(+)	0.4	1.8	0.1
International-military variable				
International Military Support**	(+)	0.8	0.2	0.1

⁵ All data taken from *Minorities at Risk Phase III* data (1997) (detailed measurement and coding information can be found in the accompanying codebook), except for GDP per capita which was found in the World Bank's *World Development Report*. All data represent conditions in 1990 except for the rebellion index which measures conditions from 1990-1995 in an attempt to position the dependent and independent variables in a temporally causal relationship.

With few exceptions, the variables compound the mystery rather than resolve it. Only three variables (marked by **) portray the linear pattern of correlation that is expected from the literature. First, Africa is substantially poorer than Europe and Latin America which in the traditional and resurrected modernization literature could explain Africa's relative propensity for conflict. This literature does not, however, speak with unanimity on the subject and must also be read in the context of numerous critics who argue that the process of modernization may, in fact, foster civil unrest. Second, Europe and Latin America are more democratic; democracy is often viewed as enhancing conditions of peace because conflict is transported from the battlefield to the ballot. In most democratization literature, this pattern is well supported (although perhaps more in a Kuhnian than Lakatosian sense), but it has always been a particularly sticky issue in Brazilian studies. With Gilberto Freyre's (1946) introduction of "racial democracy" and the reaction of its critics from Florestan Fernandes' (1969, 1972, 1977) to the more recent Fiola (1990) and Picerno (1992), it became clear that democracy and oppression or conflict are not so simply related as one might think. Finally, Mitchell (1985) helped expose the complex relationship between race relations and the *abertura democrática*.

Finally, the third variable to potentially explain peripheral Africa's plight is the much greater quantity of external military support it receives compared to Latin America and Europe. Western Europe has the power to shield itself from all but very minimal international interference. Regarding Latin America and Africa, both served as the battleground for many of the Cold War's bloodiest confrontations, but Africa suffered so disproportionately.

With many of the remaining variables, the pattern seems just the opposite; Western Europe and Latin America seem to display more of the conditions that would make them ripe for ethnic strife. Regarding this apparent inconsistency, the Western European statistical illusion can be easily resolved. In the Minorities at Risk set, the data are coded for each country with the result that ethnic groups that span countries are counted multiple times in aggregated or averaged displays. The Roma (Gypsies) are considered an "at risk" groups⁶ in four different countries so they represent four of the twenty total cases.

⁶ The Minorities at Risk project labels groups "at risk" and thus includes them in the data set when they meet minimal criteria of discrimination and mobilization (explained in greater detail in Gurr

Representing the most economically repressed and ethnically distinct group, they skew the averages considerably when their weight is multiplied fourfold. Once removed from the data, European conditions appear much more peace-prone compared to Africa and Latin America. Latin America, on the other hand, has no easy statistical remedy and continues to defy expected patterns, especially when compared with Africa.

In Latin America economic, political, and cultural disadvantages and discrimination are all substantially higher than in Africa, potentially lending more fuel to racial and ethnic tensions. Furthermore, racial, ethnic, and cultural differences are greater in Latin America than in Africa, thus enabling a stronger identity foundation upon which to mobilize. Finally, ethnic/racial groups in Latin America face harsher demographic, ecological, and land-related conditions which are often blamed for ripening conditions of conflict. In sum, as the pattern of bold numbers in Table 1 indicate, Latin American conditions across the board are more ripe for ethnic conflict despite the fact that actual ethnic conflict is substantially less than that found in Africa.

How can these numbers and the differing accounts they represent be reconciled? Two approaches are worth pursuing. First, more sophisticated regression statistics can assess the relative importance of the variables and enable us to throw out the weaker, contradictory evidence. Later, when regression analysis fails to resolve all inconsistencies, I will attempt to develop a sophisticated and comprehensive theory (drawn from the world-system paradigm) to account for what may on the surface appear as contradictory evidence. Finally, I will apply that theoretical framework to historical cases.

Regression analysis (OLS)⁷ is precisely the statistical tool needed to consider many variables at once and discover how they relate to a dependent variable (racial and ethnic conflict) in relation to each other, assess their relative importance and the unique contribution of each variable. A consideration of several dozen potentially relevant variables produced the following results.

1993, 5-10).

⁷ The broad scales (9 values for rebellion) and the ordinal nature of all of the variables preclude the need for probit or logit analysis. Having tested for and found no heteroskedasticity, GLS regression is also unnecessary and may introduce new complications through weighting errors.

Table 2 -- OLS Regression Analysis with Rebellion Index as the dependent variable ⁸

Variable	Slope (B)	Standard Error (SE B)	Beta Weight	Significance
International Military Support	.97	.11	.44	<.01
GNP per Capita⁹	-.23	.06	-.22	<.01
Declining Environment	.32	.14	.10	<.05
Demands for Independence	.52	.07	.18	<.01
Politico-Historical Identity	.21	.07	.15	<.01
Constant	1.29	.38		

N = 254

Further analysis discovered that three supplemental conditions are also significantly related to the magnitude of conflict although to a lesser extent.

- ⊆ Competition for Land
- ⊆ Declining Caloric Intake
- ⊆ Organizational Cohesion

Table 2 and the three supplementary variables tell three very interesting stories. First, the combined explanatory power of the first five variables produces an adjusted R² of .47, indicating that this handful of factors can account for an impressive 47% of conflict's variance off the mean. Each of them is highly significant despite their possible interference with each other, and each has a strong slope in the expected direction. The last three are likewise significant but with weaker slopes.

⁸ As with Table 1, all data is taken from *Minorities at Risk Phase III* data (1997) except for GDP per capita which was found in the World Banks *World Development Report*. Once again, all data represent conditions in 1990 except for the rebellion index which measures conditions from 1990-1995.

⁹ It is curious that in this model, GDP/Capita and the HDI are almost perfectly interchangeable. The HDI (which encompasses GNP/Capita complimented by educational and health factors) can replace GDP/Capita with only a .01 loss in R². Further study is necessary to determine if the supplemental ingredients of HDI could impact this model on their own.

Second, it is remarkable which variables made the final cut and demonstrated statistically significant explanatory power. None of the differentiation or discrimination factors (neither economic, political, nor cultural) had any unique explanatory power. Nor did ethnic or racial differences or ethnic or cultural identity have a linear statistical impact. Oddly enough, even the level of democratization did not prove significant.

Third, of those variables that did make the cut, military aid was by far the most important contributor to the magnitude of conflict (with a beta weight of more than twice any of the others). The level of economic development came in a distant second. Given the contradictions exposed in Table 1, this finding would suggest that all those factors that might make Latin America more conflict prone are eclipsed by the peaceful influence of lower military aid and higher economic development. However, one can not totally disregard the other variables just because they are less influential. Identity, ecological, and organizational factors still make up a numerical majority of the model's variables and cannot simply be swept under the carpet. The contradictions remain and must be dealt with by seeking a theoretical reconciliation.

WORLD SYSTEM THEORY

World system theory may provide the cohesive explanation needed to further resolve the data's contradictory messages. Although underdeveloped in world system theory, the concepts of ethnicity and race do play important roles in the political and economic dynamics of the capitalist world system.

Early in Immanuel Wallerstein's writings the concept of ethnicity emerged as an important element of the world-system. In 1980, he wrote that "ethnic/national groups. . . postdate, not antedate capitalism: all are consequences, not cause" (Wallerstein 1980, 745). This early analysis seems overly materialist, and Wallerstein, anticipating this criticism entrenches himself further by claiming that these identities are constructs to be invented or revived, with no more continuity than a temporary myth designed to further momentary political aspirations (746-7).

Not surprisingly, many world-system scholars take issue with his extreme stance. Roland Robertson, for example, challenges this economic primacy (King 1991). Similarly, Paul James rebuts Wallerstein's "overstated cultural inventionism" (James 1997, 131). Many others see a more interactive

relationship. *Racism, Sexism, and the World-System* (Smith, et al 1988) serves to disclose both sides of this relationship between the capitalist system and ethnicity. Four essays by Martha Gemenez, Nancy Lutz, Peter Bell, and Kathie Kasaba discuss how global capital affects race and gender relations. Other essays portray the other side of this coin by demonstrating how race and gender relations affect the modern world-system.

Fortunately, Wallerstein's later writings provide a more sophisticated construction of ethnicity. In "The Construction of Peoplehood: Racism, Nationalism, Ethnicity" (1987)¹⁰ Wallerstein defines and differentiates these three key concepts and then explains how "each of the three modal terms hinges around one of the basic structural features of the capitalist world-economy" (381). Race is tied to the "core-periphery antimony," nation to the "political superstructure of the historical system," and ethnicity to the creation of household structures.¹¹ Here Wallerstein retains some economic primacy but intertwines it with the political. Just as the racial construct followed from the core-periphery economic division, nationalism followed the creation of the state system; "statehood preceded nationhood" (384). Ethnicity, he explains later, fills an important role in both of these political and economic worlds, defusing the tensions created between their demands for economic inequality of the system and legal equality within the state. It "provides a legitimation to the hierarchical reality of capitalism that does not offend the formal equality before the law" (386).

This conceptualization of ethnicity is particularly insightful on two fronts. First, this distinction provides substantial insight into the troubling distinction between race and ethnicity.¹² In Wallerstein's earlier writings he all but fused ethnicity and race. Writing on social conflict in an independent Africa in 1972 he surveyed a dizzying array of African social structures and concluded that

¹⁰ Later reprinted in Balibar and Wallerstein (1991).

¹¹ More fully developed in Wallerstein 1984 "Household Structures in the Capitalist World-Economy."

¹² Wallerstein is certainly not the first to make this distinction, but many accept that the fundamental difference is one of biology versus culture/history (van den Berghe 1983 and Bentley 1981).

“This rapid sketch of the African scene is meant to underline one point: there is no useful distinction among the presumed varieties of status groups, such as ethnic groups, religious groups, races, castes. They are all variations of a single theme; grouping people by an affinity that mythically predates the current economic and political scene and which is a claim to a solidarity overriding those defined in class of ideological terms” (Wallerstein 1991d, 193).

At this time in his scholarship when economics still trumped politics he concluded that

“. . . behind the ethnic 'reality' lies class conflict" (Wallerstein 1991d, 198). In his later work on the world system, however, these distinctions took on a crucial and inherently world-system dependent nature.

A second crucial implication of the "Construction of Peoplehood," is that it suggests that ethnicity does not cause or incite conflict within or against the system. Instead, ethnicity absorbs the conflict inherent in the capitalist system and resolves an otherwise fatal crisis of legitimacy. In this role ethnicity justifies a state's necessary internal stratification of labor with that state's claim of political equality, just as race serves to justify the world stratification external to the state.¹³

A final crucial insight into the nature of ethnicity arises in conjunction with the intermediary role of ethnicity--the inherently intersubjective nature of ethnicity--its social constructedness. In Etienne Balibar's words, "It appears equally essential to us to think 'nation' and 'people' as historical constructs, by means of which *current* institutions and antagonisms can be *projected into the past* to confer a relative stability on the communities on which the sense of individual 'identity' depends" (original italics, Balibar and Wallerstein 1991, 10). This constructed nature lends it a certain flexibility necessary to resolve the legal equality/economic inequality tension mentioned above. "The way these two thrusts [labor force stratification and the ideology of equal opportunity] were reconciled was that the actual stratification was flexible, since the boundary lines of ethnicity (including the rules for endogamy) were themselves malleable" (Wallerstein 1991b, 109).

On the surface, the socially constructed nature of ethnicity described here may resemble the economic primacy or cultural inventionism critiqued above--a cultural myth is created upon an economic foundation. However, regarding race and ethnicity as a social construct is nothing novel. Almost all ethnic

¹³ Notice, however, that where race becomes salient internally to the state, it also acts with the same legitimizing force as ethnicity. The difference then is in its origins, not its effects.

literature on ethnic dynamics has abandoned the primordial nature of ethnicity and race and replaced it with some conception of a subjective constructivist ontology. What is so often missing from this redirection, however, is the driving force of these constructions. Is it, as Doty (1996) claims, a discursive construction, or as Gagnon (1995) and other realists claim, an elite-driven exercise in propaganda? In contrast, Wallerstein's contribution is found in ethnicity's now inextricable, theoretical location within both the economic and political fabric of the capitalist world-system. Wallerstein explains

“. . . racism has always combined claims based on continuity with the past (genetic and/or social) with a present-oriented flexibility in defining the exact boundaries of these reified entities we call races or ethno-national-religious groupings. The flexibility of claiming a link with the boundaries of the past combined with the constant redrawing of these boundaries in the present takes the form of the creation and constant re-creation of racial and/or ethno-national-religious groups or communities. They are always ranked hierarchically, but they are not always exactly the same.

“This kind of system--racism constant in form and in venom, but somewhat flexible in boundary lines--does three things extremely well. It allows one to expand or contract the numbers available in any particular space-time zone for the lowest paid, least rewarding economic roles, according to current needs. It gives rise to and constantly re-creates social communities that actually socialize children into playing the appropriate roles. . . . And it provides a non-meritocratic basis to justify inequality” (Wallerstein 1991c, 34).

Here we reach a critical juncture. As the dynamics of racial and ethnic construction in the world-system become refined, the distinction between race and ethnicity grows fuzzy. Especially when considering the three consequences of flexible boundaries mentioned in Wallerstein's second paragraph, the nature of race serves in an identical capacity to that of ethnicity (or religion and sexism for that matter).

In sum, the world system theory positions ethnicity in the midst of the economic inequality/legal equality tension, and equates this particular role with that of race. Race has a different role than ethnicity outside of the state, and race has a different origin and history within the state, but once the world system has introduced race into the state, its intermediary role between political justice and economic stratification is identical to the role of ethnicity. There is, however, one noticeable exception. Whereas as ethnic

relations may begin in a roughly parallel power structure, racial relations cannot. Race is always introduced into a state with the world-system racial hierarchy of power attached.¹⁴

¹⁴ The reader will notice that much of the logic and implication of this construction is neither new nor unique to world-system theory. For example the construction of racial relations as hierarchial (reflecting the world system hierarchy) sounds suspiciously like Donald Horowitz's concept of "ranked" systems which he contrasts to "unranked" systems (1985). Of the ranked systems, Horowitz describes the "systems of race relations founded on African slavery in the Western Hemisphere were archetypical cases of ranked ethnic systems. . ." (1985, 22). Such ranked systems are "virtually all. . .in a state of rapid transition or of increasing coercion by the superordinate group to avert change" (Horowitz 1985, 32). Conflict in these ranked systems ". . .has a class coloration" and "When warfare occurs, it takes the form of a social revolution" (1985, 30). In unranked states, on the other hand, warfare mimics a conflict between states in an anarchic international system (1985, 31).

That race and ethnicity are self-reproducing institutions in the world system is likewise considered by scholars outside the world system paradigm. George Borjas, for example, develops the concept of "ethnic capital" which serves (in world-systems terminology, not his) to reproduce the system of capitalist-ethnic relations. Ethnically bound ". . . 'neighborhood effects' work through a myriad of social, cultural, and economic institutions" to transmit skills and their accompanying economic status across generations within ethnic groups (Borjas 1992, 149 and 123). Contrary to the melting pot hypothesis in which ethnicity's relationship to capital change with time, Borjas demonstrates "that ethnic capital" enables ethnicity's relationship to capital to be reproduced and maintained.

Finally, the idea that oppression (racially justified or otherwise) can limit conflict contrary to the vintage frustration-aggression thesis, is an observation of scholars beyond Wallerstein's realm. Mark Lichbach (1987), Dipak Gupta, Harinder Singh, and Tom Sprague (1993), all theorized about the potential relationships between repression and rebellion. Each has speculated that although some oppression may incite violence (according to the frustration-aggression framework) a great deal of oppression may actually reduce the likelihood of protest. Where ethnic groups are extremely impoverished they cannot gather the physical resources necessary to launch a sustained rebellion. Where they are politically isolated, they may not access political-organizational apparatuses needed to mobilize large-scale resistance. Each study utilizes a large-N statistical analysis to demonstrate how this very dynamic represents a majority of real-world cases.

Having considered a few of these parallel theories--differing in paradigmatic origin, but similar in empirical expectation to that of Wallerstein's world system theory--I suggest we lay them aside. One should expect that most theories derived from or subjected to empirical observation will predict similar behavior. One should also not be surprised that these varying approaches sometimes use similar-sounding logic to explain their observations. The real test is which can best explain the entirety of ethnically-related causes and consequences in the most coherent and logically consistent manner. Unfortunately, a full paradigmatic comparison is beyond the scope of this paper. Instead, this paper attempts to create theoretical space to introduce a world-system approach, develop and refine that approach, and suggest, with the aid of a few statistical and qualitative observations, that the world system approach deserves more serious consideration.

- C Having laid out world-system theory's embryonic application to race and ethnic relations, I propose a few preliminary hypotheses:
- C Where core (white) and peripheral (black) elements of the world-system are introduced to a country as part of its incorporation into the capitalist world-system, the racial stratification within that country will mirror the world-system at large.
 - C Where racial stratification is not introduced, and consequently its accompanying hierarchy is not imported, the process of incorporation into the capitalist world-system will foster competition among unranked ethnic groups and thus agitate relations among domestic ethnic groups.
 - C Any element of race introduced by the capitalist world-system or elements of ethnicity agitated within the state by the process of incorporation into the world-system will form a ranked relationship within that state (Wallerstein 1991c, 34).
 - C Economic and political inequality will be substantial and the racial or ethnic ranked hierarchy will serve to justify that inequality while maintaining the state's legitimacy (Wallerstein 1987, 386). Hence, the presence of ranked racial or ethnic hierarchy will lessen conflict.

Each of these hypotheses can be supported, dismissed, or refined by empirical exploration of Portugal's effect on ethnic and racial relations in Angola and Brazil.

RACE AND ETHNICITY IN ANGOLA AND BRAZIL

The Angolan and Brazilian cases chosen to represent the periphery and semi-periphery display a number of characteristics that suggest they may be useful cases to analyze under the theoretical lens of world-system theory. Both share a colonial heritage under the same Portuguese metropole. Both have lengthy histories of Portuguese intervention in their economic and political spheres, and both reflect that heritage in their racial and ethnic makeup and relations today. Despite all these similarities, however, it should soon become clear that the particular way that Portugal dealt with Angola compared to Brazil created peripheral and semiperipheral relations respectively which, in turn, had vastly differing consequences regarding the type of ethnic legacy the Portuguese left. Where (as in Brazil) colonial practices left the world-system's hierarchical racial print, domestic relations of racial hierarchy served to justify inequality and diffuse conflict. Where, conversely, (as in Angola) colonial practices agitated ethnic differences and created competition but failed to establish an enduring hierarchy, conflict remained unchecked.

ANGOLA

Angola's current civil strife dates back to March 1961, but its political, economic, ethnic and racial roots extend another five centuries into four marked periods of Angolan history. First, before Portuguese contact, distinct ethnic political structures maintained political and economic institutions apart from the world-system. Second, once the Portuguese made contact with the external area of Angola, subtle changes began. Third, these institutions began to radically change as Portugal integrated Angola politically and economically into the world-system--the depth of change corresponding to the depth of this integration. Fourth, these institutions changed once again at independence (in 1975) when Angola took its place of political independence yet economic dependence in the world-system.

The ethnic groups most central to this study were all located in central to northern regions of modern Angola and all were positioned near the coast where they were most susceptible to colonial influence. The territorial positions are loosely represented by the map in Figure 1¹⁵.

¹⁵ Modern Angola fills approximately the central bottom two-thirds of the map in Figure 1. Its northern-most border begins in the west where the Congo River meets the Atlantic and extends west and slightly south-west about half way to Lake Tanganyika.

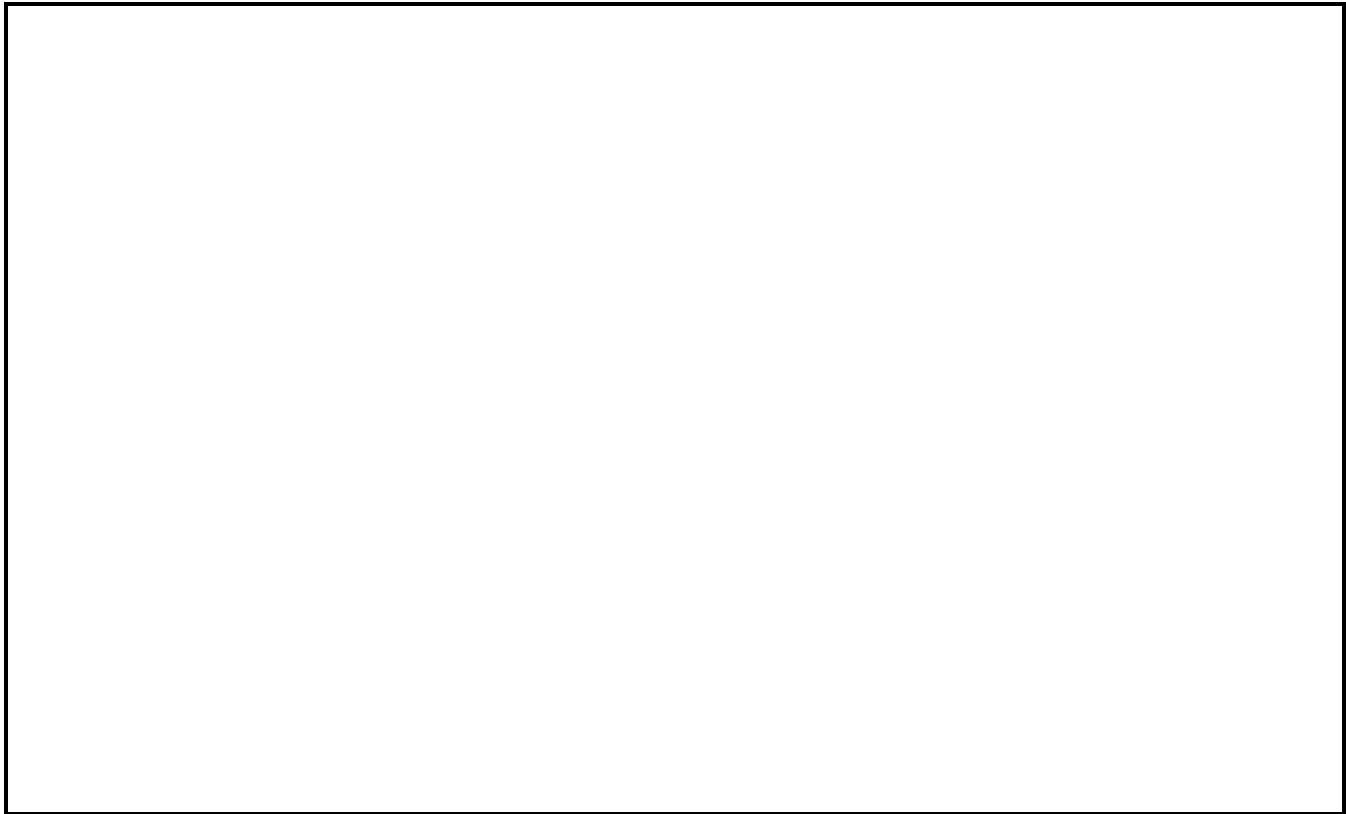


Figure 2. Map of West Central Africa (Birmingham 1966, xviii).

The Super-External¹⁶ or Zone of Ignorance

Referring to the map above, the three ethnic groups of most interest to this study are the Kongo (or Bakongo) located in the north-west corner of modern Angola, the Mbundu (also referred to as the Ndongo kingdom) located south of the Kongo, and the Ovimbundu located farther south and slightly inland. Each of these three groups had some political and economic character prior to Portuguese contact.¹⁷

¹⁶ Thanks to Jon Carlson for the terminology (Carlson 1997). Both of these terms represent areas that lie completely outside the capitalist world system.

¹⁷ The fact that they existed in one sense or another, and that historians have documented their character should not be regarded as falling prey to a primordialist fallacy so often criticized in current ethnic literature (see for example Terence Ranger's *Construction of Tribalism in Africa*). Primordial essentializing is a danger and there are now well documented accounts of ethnic identity being created and manipulated by colonizers and entrepreneurial elites. On the other hand, to claim that nothing

Prior to incorporation, the Bakongo had a strong, centralized political system with a tributary economy.

"At the head of the Kongo kingdom is a king of kings who is the absolute ruler of all his realm, and none may intervene in any of his affairs. . . . The village chiefs have above all to take care to collect from their subjects the taxes which are due to the king, and which they each of them carry to the governor of the province. The governor presents himself twice in each year at the royal capital in order to pay in the tribute. . . . (Birmingham 1965, 3).

"The chief function of the complex administrative hierarchy of the Kongo kingdom. . . was the raising of tribute" (Birmingham 1966, 4). As will become apparent later, the Kongo were centralized and strong enough prior to contact to be treated initially by the Portuguese as equals.

The second ethnic group of concern is the Mbundu who resided just south of the Kongo. Very little is known about the Mbundu, whose history before Portuguese contact is portrayed by several contradictory traditions. The dominant interpretation of the available historical record suggests that the Mbundu grew out of three peoples who were brought together before the Portuguese arrival by the Ngola Kilaji who "brought the concept of centralized kingship and founded a monarchy" called the kingdom of Ndongo (Birmingham 1966, 20). The subsequent growth of this kingdom, however, is intricately woven in history with the Portuguese contact and the slave trade they brought (Birmingham 1966, 20).

Of the final ethnic group of interest, the Ovimbundu, very little is known prior to Portuguese contact. It is known that they were not as politically centralized as their northern neighbors. When contact was established in the 18th century, there were 22 Ovimbundu kingdoms whose power quickly crumbled under the Portuguese occupation of the 20th century. There remained, however, a residual sense of ethnic identity that endured until after World War II whereby the Ovimbundu still identified with one or another of these kingdoms (Pitsch 1995b, 1).

Regarding the relationships among these three peoples, little is known, but it seems that "before the advent of colonialism, the groups seemed to have had little contact with or hatred of one another. It

existed before contact demeans the great African kingdoms whose histories had been preserved in oral traditions and documented by early contacts, and it unduly credits the manipulative power of the colonial powers.

appears that ethnic tensions arose only with the possibility of gaining political power over all of Angola” (Pitsch 1995b, 2). Later evidence suggests, however, that competition for economic power (control of the slave trade) preceded the later political battles.

First Contact--Passing into the External Area

The Portuguese 'discovered' Angola in 1483¹⁸ and established peaceful trading posts and diplomatic ties with the powerful Kongo kingdom (of the Bakongo people) in northern Angola. Diplomats were exchanged, and the Kongo King, Nzinga Nkuwu, requested missionaries and technicians; he received them along with teachers and explorers (Bender 1978, 14). Shortly after 1491, the king, "many of the royal family, and most of the noblemen were baptized in the Catholic Church (Bender 1978, 14). These good-natured relations began to sour, however, as the slave extraction soared to 60,000 in the first two decades and to 345,000 from 1506-1575. "By 1526 preoccupation with the slave trade eclipsed any Portuguese intentions of good will," and in response, Nzinga Nkuwu's heir and son, Afonso, banned all trade with Portugal--an order he was forced to revoke. Afonso wrote to João III "there are many traders in all corners of the country. They bring ruin to the country. Every day people are enslaved and kidnapped, even nobles, even members of the King's own family" (Bender 1978, 16). Relations became bad enough that the Portuguese tried unsuccessfully to assassinate Afonso in 1540.

This early slave trade was led exclusively through the Kongo port of Mpinda, but it did not exclusively affect the Kongo. "The actual capture of slaves was organised chiefly by the king of the Kongo who conducted wars and raids [mainly against the Mbundu] and then sold the captives to the Portuguese" (Birmingham 1965, 7). In fact, in the earliest documented reference (in 1512) of the Mbundu's relationship with the Bakongo, the Kongo king referred to himself as the master of the "Ambundos." The next documentation in a 1514 letter spoke of how the Bakongo capture slaves from the Mbundu (Birmingham 1966, 28).

This simple relationship of domination and exploitation is, however, only the beginning of a complicated relationship of political and economic power among the Bakongo, the Mbundu, and the

¹⁸ Other sources suggest 1482 or 1484.

Portuguese. Due to the relatively reliable relationship the Portuguese had established with the Bakongo, the Portuguese crown sanctioned official trading practices through Mpinda which enabled the crown to control the flow of slaves and tax their sale.¹⁹ Nevertheless, Portuguese traders went south and engaged in substantial illegal slave trade directly with the Mbundu (Birmingham 1966, 32). This increased trade with the Mbundu seemed to have a similar effect as it had had on the Bakongo, strengthening the Ndongo (now sometimes called Angola) kingdom. By the end of the 1550s the Mbundu king, the Ngola, who by Bantu tradition held a monopoly of external trade,²⁰ soon rose in stature to rival the king of the Kongo.²¹ “By trading with the Mbundu, therefore, the Portuguese were themselves indirectly responsible for the emergence of a powerful unitary state in Angola” which resulted in “the growth of a rivalry between the rulers of Kongo and Ndongo” over control of the lucrative slave trade (Birmingham 1966, 33). This rivalry escalated to the point that the Kongo king sabotaged relations between the Portuguese and Mbundu. The Kongo wished to maintain their “official monopoly of the central African slave trade” and with it the status of “the sole legal supplier of European goods to the Ndongo”--a lucrative middleman position (Birmingham 1966, 37). The Portuguese crown, in turn, wished to maintain control of the slave trade and its tax revenue. This, among other reasons,²² led to a shift in Portuguese policy to one of direct military intervention in Ndongo (Angola).

Eventually, the great supply of slaves in the south drew the Portuguese attention southward, and within a century the tables had been turned on the BaKongo-Mbundu relationship. For a variety of demographic and political reasons including the intervention of the Dutch (Birmingham 1966), the

¹⁹ In fact, a royal ban was issued in 1504 prohibiting trade south of the Congo River.

²⁰ Furthermore, because slaves were the commodity, the Ngola also had a monopoly on their supply; only he was “responsible for all wars” (Birmingham 1966, 33).

²¹ Both states had grown in stature to the degree that historian David Birmingham described them both in the 1550s as “states” separated by a recognized boundary, the Dande river (Birmingham 1966, 33).

²² The bad relations sparked by the Kongo king combined with rumors of silver among the Mbundu, missionary troubles, and Portuguese insecurity brought on by the Jaga successfully invading the Kongo all contributed to this pro-military shift.

Portuguese shifted their base of power permanently south to the Mbundu port of Luanda. Consequently, the power relationship between the Mbundu and Bakongo became just the reverse what it had been a century before (Birmingham 1966, 123).

Despite the profound impact this slave trade had on the two kingdoms and their relationship with one another, the groups were still not technically incorporated into the world-system. Their economic ties to the Portuguese and to each other were purely extractive and did not represent a trade in necessities or a capitalist mode of production. In fact, Wallerstein uses Angola as an example of a trade in luxuries that typifies relations with the external area, as “the kind of trade the Portuguese launched in West Africa, in the Congo region, and in East Africa in the fifteenth and sixteenth centuries. . .” (Wallerstein 1986, 103). He continues, “All of this trade prior to 1750 which involved African states with partners outside of themselves was ‘long-distance trade’ whose quantity varied on a market determined less by demand than by effective supply, that is, of products successfully transported from the point of production to the market” (103). Incorporation would require a qualitatively different set of relationships and have a still greater impact on Angola’s ethnic and racial relations.

Incorporation

According to Wallerstein, by 1750, “slave exports from Africa had certainly now ceased to be a ‘luxury’ item from the point of view of the capitalist world-economy. They were, in Sraffa’s terms, ‘entering into the production of all commodities.’ And the quantitative expansion of the trade was in turn having its effect on the social structures of the exporting regions” (Wallerstein 1986, 104). “Thus the slave trade served as the cutting edge of the peripheralization of Africa in the period 1750-1900. . .” (Wallerstein 1986, 106).

Elsewhere, Wallerstein states that “. . .1750-1760 or thereabouts marked a major turning point in the European world-economy.” To paraphrase Wallerstein's causal chain, the industrial revolution led to an increased demand for sugar and cotton production which led to an increased demand for slaves. As the market's demand for slaves increased so did their price--a price that began to be paid more and more in the currency of firearms. Finally, Wallerstein's causal chain concludes with the political impact of an integrated economy and a modern military--large state structures in West Africa.

This turning point had external origins but carried with it serious internal consequences. The high demand for slaves compelled the Portuguese to push their way further inland to seek larger sources of slaves. This brought them into contact with the Ovimbundu and exposed numerous other eastern peoples to the slave trade. As eager as those before them to profit from this market, more inland groups, most notable the Jaga, entered the fray in competition for control of the trade and the profits it brought. The Mbundu as well were now situated on the highway of trade in a better position to be the suppliers rather than the source of slaves.

The results of this increased penetration were tragic. Conflict among the ethnic populations as well as with the Portuguese was constant. Described by one author, "By the mid-eighteenth century Angola was a sorry place" (Birmingham 1966, 145). In the words of Luanda's governor in 1753, Angola was a "rotten, viscous, and corrupt colony" (Birmingham 1966, 145).

As the incorporation process deepened, the climbing price of slaves eventually threatened the profitability of the slave trade. In response, the new British hegemon, which "had the most to gain from a proper functioning of the capitalist world-economy[.]. . .took the lead in abolishing the slave-trade and substituting 'legitimate trade,'--that is, encouraging the production by Africans of cash-crops. . .for the world market" (Wallerstein 1986, 68-9). In response to abolition, "In Angola, the Portuguese sought to replace revenue from the slave trade with increased taxation on the African population, increased customs duties, and the expansion of the area under Portuguese sovereignty. . ." (Wallerstein 1986, 108).

Wallerstein explains that this process of incorporation accelerated and its effects deepened. By the mid 20th century three social changes emerged as a consequence. First, Portuguese colonial policy created a narrow segment of assimilados (natives who were assimilated culturally into the Portuguese ranks) some of which were mulattoes (those of mixed race also referred to as mestiço). Second, the Portuguese policy of forced labor (evolving from the abolition of slavery) caused many Bakongo to emigrate to the Belgium Congo. Third, cash-crop plantations in Angola drew many Portuguese settlers, making Angola a white settler colony (Wallerstein 1986, 186-7). Each consequence deserves further consideration.

Politically, the economic expansion took the form of military conquest and territorial consolidation. In the early 1900s Portugal's political control over Angolan territory enlarged profoundly and quickly--"The unsubdued areas of Angola. . .thought they might be peaceful for the present, constituted a potential danger which should be dealt with before it could become actual" (Hammond 1966, 278).

Beneath this political consolidation lay a clear economic motive. Said António Ennes' chief of staff, Eduardo Costra, "either we organize our colonial domination rapidly and solidly, or we shall see it, very shortly, reduced to fragments of territory without value and ports without trade" (Hammond 1966, 278).

Economically, this expansion took the form of forced domestic labor for infrastructural improvements and the production of cash crops for export.

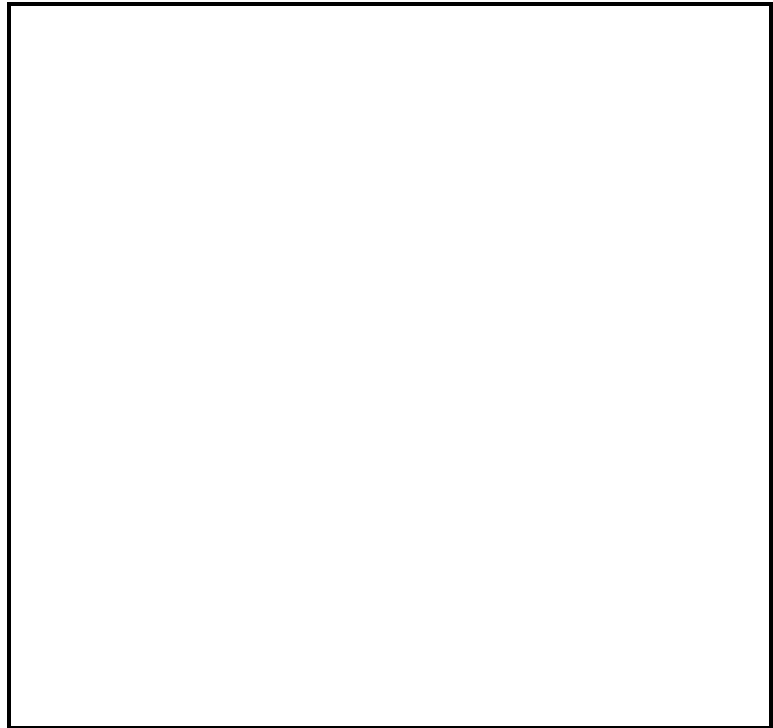


Figure 3. Extent of Portuguese Occupation in Angola 1906 (Hammond 1966, 274)

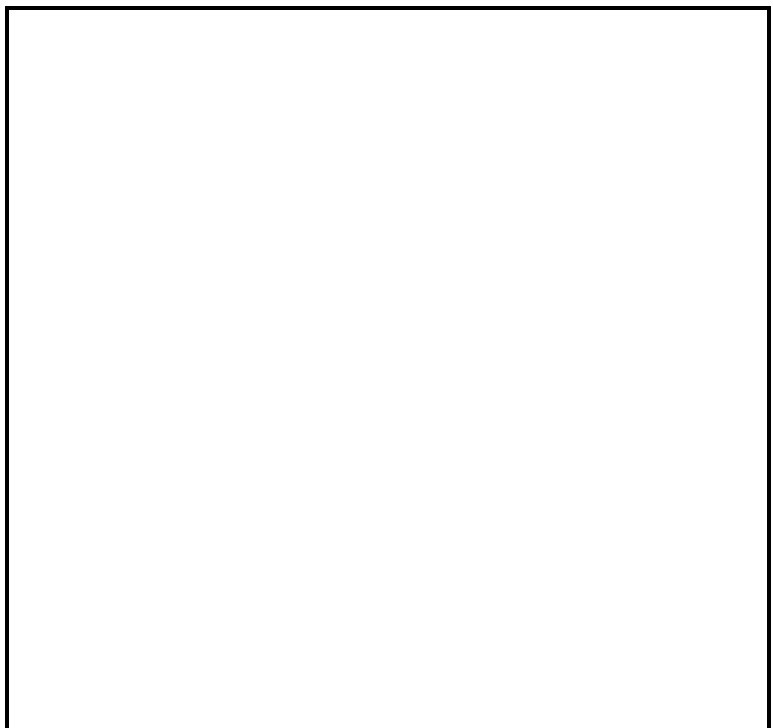


Figure 4. Extent of Portuguese Occupation in Angola 1911 (Hammond 1966, 274)

Racially speaking, another profound impact of the 20th century policies was the unprecedented influx of Portuguese settlers into the Angolan territory.

Portuguese not only settled in large numbers but they continued the practice of intermarrying with the indigenous populations, creating a new racial and social class.

This racial mixing was not, however, a sign of racial

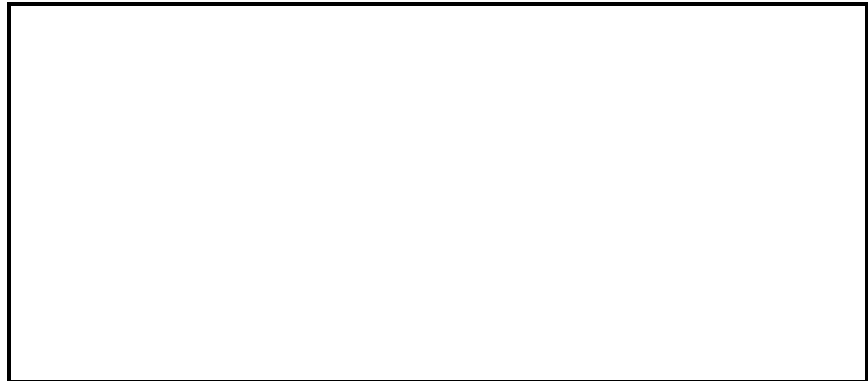


Figure 5. Racial makeup of Angola (Bender 1978, 20)

equality. A racial hierarchy was firmly entrenched which reflected the world system stratification.

The still powerful Portuguese myth of Lusotropicalism²³ should not be assumed to have hindered any racial hierarchy within Angola. Various arguments have been made historically (even very recently) stating that missionary efforts, miscegenation, and lack of rebellion (Monteiro 1933, 24) were proof of racial equality (Andrade 1969; Monteiro 1933, 24). Said one Portuguese, "God made white man. God made black man. But the Portuguese made the mulatto." (Okuma 1962, 26). However, the writings of Boxer (249-272, 1969), Okuma (1962), and most of all Bender (1978), have thoroughly discredited this myth.²⁴

From the three above-mentioned economic, political, and cultural (racial) processes that incorporation set in motion grew two resistance forces and the target of that resistance. The migrant population of Bakongo who "came together on their ethnic identity" gave rise to the UPA; the assimilados to the MPLA (Popular Movement for the Liberation of Angola). As UPA formed an ethnic alliance with

²³ Lusotropicalism is the myth which suggests that the pervasive practice of interracial Portuguese marriage indicates the absence of Portuguese racism.

²⁴ Anecdotal yet sobering evidence provided by Bender (1978) tells of a *Washington Post* reporter who in 1971 "asked to meet prominent Africans in government and business, he was told by the director of Angolan Information and Tourism that 'unfortunately, *he* left last week'" (Bender 1978, 201, italics added). Apparently there was only one, and he was a mestiço (mulatto) assimilado.

some neighboring groups it evolved into the FNLA (National Front for the Liberation of Angola) (Wallerstein 1986, 187). Through the course of the early conflicts "the three main Angolan groups. . .have distributed themselves *de facto* in different geographic areas: FNLA in their northern Bakongo bastion near the Zaire border; UNITA [National Union for the Total Independence of Angola] and the Chipenda forces in Ovimbundu areas in the south; and MPLA in the capital, Luanda as well as a broad central belt running across the country . . ." (Wallerstein 1986, 193). This lends a distinct ethnic element to the conflict leading one analyst to claim that

"By the late 1950s, each of Angola's three main ethno-linguistic groups had been associated with a respective military organization struggling for the independence of Angola. The Ovimbundu people of the south support UNITA (National Union for the Total Independence of Angola), the Kimbundu supports the MPLA (Popular Movement for the Liberation of Angola) and the Bakongo of the North, the FNLA (National Front for the Liberation of Angola). In addition to their political and ideological difference, the ambition for their leaders and the competition for foreign assistance add to the ethnic differences represented by each of these organization" (Pitsch 1995b, 2).

Similarly, John Marcum states that before Angola's independence ". . .ethnicity, culture, class, and race--had already established the basic character of the three movements." (Marcum 1978, 185). Marcum traces in great detail the movements to arise out of each ethnic population in *The Angolan Revolution, Volume I* where in the first three chapters he painstakingly exposes the "Luanda-Mbundu sources of Angolan nationalism," "the Bakongo sources of Angolan nationalism," and the Ovimbundu. . . sources of Angolan nationalism" (Marcum 1969, 13-122). In summary, he charts the complex organizational genealogies of the three groups (in the figure below) which eventually evolved into the UNITA, MPLA, and FNLA. From the beginning they were stratified along ethnic lines. To pick up where this chart leaves off, the UPA became the FNLA in 1962 (Pitsch 1995b, 2). In 1963, Jonas Savimbi breaks with the FNLA and draws support from both the Ovimbundu and Bakongo in forming the new UNITA, which, in time, rose to become and remain the principal rival of the MPLA, which rivalry has since marginalized the role of the FNLA (Pitsch 1995a, 2-3).



Figure 6. Angolan nationalist movements and antecedents. (Marcum 1969, 350-1).

Decolonization

The dynamics of this rivalry changed very little when the Portuguese left. As the MPLA assumed power they were immediately confronted by the UNITA in a struggle for power over the newly independent state. Ann Pitsch explains "Since independence, the struggle had been a civil war with each of the main three ethnic groups (the Bakongo less than the Ovimbundu and Mbundu) in competition for power." (Pitsch 1995b, 2).

What did change was the removal of a weak, but relatively central state structure based on colonial racial hierarchy. In its place emerged a state more in name than in practice. The new Angola was much like the old, but now the Portuguese were no longer present to impose an ethnic hierarchy and imitate a state. Instead, an unranked ethnic structure emerged wherein the ethnic (and now ideological) camps represented by the MPLA (the government) on one hand and UNITA on the other, competed on fairly equal footing without either emerging as a clear victor in an established hierarchy.

BRAZIL

Theories regarding racial relations in Brazil (unlike the information I've pieced together on Angola) are so well developed and discussed in the literature that I can scarcely scratch the surface in the space available. A brief summary of contrasts must suffice. In a world-system analysis the differences all begin with Brazil's incorporation into the capitalist world-system and the resulting attempt to commodify labor.

Who 'discovered' Brazil and when are hotly debated issues (MacDonald 1996, 30-31), but it is clear that by the 1530s Portuguese were present, establishing sugar cane plantations and rounding up the necessary labor in the form of more or less coerced native slaves-- "given the need for manpower, there was no alternative to slavery." (MacDonald 1996, 161). Unfortunately, the indigenous populations did not endure well the European diseases or their work ethic (most were nomadic). In Bahai between 1563 and 1583 the native slave population dwindled from death and escape from 40,000 to 3,000. Exclaimed one Jesuit ". . .no one would believe that so great a supply could ever be exhausted, much less in so short a time." (MacDonald 1996, 163).

Consequently, the Portuguese turned to Africa for a new supply, and after sweeping through Senegal, Gambia, and Guinea they settled on Angola whose vast source of slaves they proclaimed "would not be exhausted until the end of the world" (MacDonald 1996, 164) earning Angola the prestigious title "The Black Mother" (Boxer 1975, 223). Unlike the native Brazilians, the African slaves were more resistant to the European's diseases, had no close home to escape to, were better physically capable of the work (assuming they survived the voyage), and had a better knowledge of farming and artisan trades; many were more knowledgeable and more literate than their new owners (MacDonald 1996, 165).

A triangular trade in sugar and slaves had linked Brazil well into the world economy and Brazil's racial makeup soon reflected this trend. By the end of the 16th century approximately 8,400 slaves were being imported annually (MacDonald 1996, 164) and miscegenation (due more to demographic gender imbalance than Portuguese lusotropicalism--Esteva-Fabregat 1995; Okuma 1962, 96-7; Bender 1978: and Skidmore in Fountaine 1985, 12) cast a permanent racial print on the country. Once again, but now in greater numbers "the Portuguese made the mulatto" (Okuma 1962, 26). Contrasted with Angola, where Portuguese outposts were established largely for extraction of labor and miscegenation was minimal, Brazil on the receiving end of the slave labor and slaves' productive (versus extractive) use created much different patterns. As Figures 7 (previously displayed) and 9 indicate, the racial makeup of Brazil and Angola were as a consequence profoundly different.

This racial mixing was not, however, a sign of racial equality. A racial hierarchy was firmly entrenched in the slave-owner relationship that only began to change gradually in the 1800s. Not until 1888 was slavery formally abolished, but



Figure 7. Racial makeup of Brazil (Bender 1978, 21)

the world-system-induced ranking remained and remains until this day.

Documentation of the social, economic, and political stratification of the races in Brazil is abundant. Recently four of Rio's homeless were massacred, reminiscent of a July 1993 massacre of 8 homeless black teenagers (Schemo 1997 and Burke 1995). Today blacks make up around six percent²⁵ of Brazil's population but fill 80 percent of its jails and are 82 percent of the death squads' victims (Burke 1995, 1 and 3). Black Brazilians earn only 41 percent what white Brazilians earn (Burke 1995, 1), which contributes to what Linz and Stepan call "the most unequal distribution of income and the worst social

²⁵ A highly debated figure, it could also be as high as 44 percent (Fiola 1990, 11).

welfare and educational standards of any of the southern European or South American or, for that matter, Central European countries in our set. . ." (1996, 166).

Economic and cultural currents run deep to maintain and reproduce this system, and a great debate considers how exactly it is maintained or how it might be changed.²⁶ Regardless of the method, however, the fact is the ranked, repressive, yet 'peaceful' system established in Brazil's economic and political incorporation into the capitalist world-system persists. To this day, the racial hierarchy mirrors the inequality found in the world's north-south divide.

More important to Wallerstein's theory, however, is the role race plays in between the legal and economic tensions of the state and the system. Race seems very much to take on its predicted role. The myth of racial democracy runs deep, and it is precisely this myth of which Wallerstein spoke. Only 11 of 503 congressional seats are black (only 4 self-designated black (Burke 1995, 5)) yet many blacks prefer to vote for racially whiter representatives.²⁷ The oppressed masses seem to look more to *branqueamento*, a subtle social Darwinism, and to the cultural hegemony (Hanchard 1994) that prevents meaningful action. Surprisingly, legal equality is not part of that myth but is largely a reality. It is the construction of racial meaning in the minds of Brazilians that resolves for them in the tension between legal equality and economic inequality and, consequently, diffuses conflict.

CONCLUSION

Returning to the hypotheses generated above, we see that Brazil fits the world-system mold well. As Brazil became incorporated into the world capitalist economy, white colonists and black slaves both descended upon and mixed with native Brazilian populations to recreate a system of ranked racial stratification that displays great levels of inequality, discrimination, and peace (at least in the militarized

²⁶ Explanations range from Degler's mulatto escape hatch (1971) to Hanchard's hegemonic bloc (1994) to Solaún and Kronus' 1973 work, *Discrimination Without Violence: Miscegenation and Racial Conflict in Latin America*.

²⁷ It is tragic that a forced-choice-response survey in which respondents designated certain adjectives as describing primarily White or Black Brazilians, Blacks were most often described as ugly (83%), dumb (83%), and thieves (84%). What is even more tragic, however, is that "there was no variation in responses between black and white students" surveyed (Fiola 1990, 23).

sense). In this sense, world-system theory may in part answer the question of why there is ethnic peace in Latin America.

Angola is a much trickier case. As Angola was initially incorporated, a ranked system began to emerge when the Portuguese allied with the Bakongo to raid the Mbundu for slaves. However, no substantial (core, white, Portuguese) racial element was introduced and when the last white colonists left (and with them the racial hierarchy they represented), the remaining ethnic factions stood in an unranked relationship with each other. Wallerstein does not account for this possibility, yet his failure may not prove fatal to his theory.

In his conceptualization of ethnicity, both the economy and the state are crucial poles. For race or ethnicity to function as hypothesized, they must be positioned within one state and one economy to resolve the tensions between them. In Angola, however, one might question whether there is one state. Angola may display external sovereignty but there is little internal sovereignty. Despite its appearance on a map, Angola functions instead as two states. The internationally declared government has established a network of institutions with a monopoly on the legitimate use of violence over a territory and a people, but that territory and population represent only a portion of Angola. The remainder is controlled by UNITA with its own networks, military, and economy. Angola is, in this sense, two states, and Wallerstein's ethnicity has no place. The relatively independent 'states' would instead be (according to his theory) expected to battle for economic resources and control. In sum, the only thing that separates Angola from a good fit in the world-system literature is a theoretical reconceptualization of the state (unfortunately one of world-system theory's weaker points).

Having begun that reconceptualization, we can also expect that this turn would further resolve the 'contradiction' of Tables 1 and 2. In order for there to be an ethnic or racial relationship, there must first be a joint *state* and a joint *economy*. This state must then have a monopoly of the legitimate means of *violence*. Each of the three most troublesome factors are now accounted for--a unified state (loosely associated with the democracy index), a unified economy (associated with economic development), and a monopoly of legitimate force (lack of international military support). All must be present for Wallerstein's racial and ethnic 'peace' to prevail in the semi-periphery and a deeper peace to be established in the core. Finally, the core is clearly at the center of it all, having not only established the political state and the

economy of its colonies, but also their ethnic composition and, as world-system predicts, the dynamics of the ethnic and/or racial groups within that composition.

Having extended world-system assumptions thus far, its promise becomes clearer, but such theoretical extension also reveals new, perhaps intractable weaknesses. The myriad of civil wars that, like Angola's, are often designated as ethnic conflicts, must now be removed from Wallerstein's theory of ethnicity and treated instead like interacting states. Because Wallerstein claims there are only ranked relationships, he is forced to ignore (or consider through a non-ethnic lens) many unranked ethnic relationships. This is perhaps too high a price to pay. Further investigation is necessary to reconcile what has, perhaps inevitably, started and ended as a puzzle, but it is now a different puzzle. World-system now shows promise at explaining ethnic 'peace' in the semi-periphery, although perhaps less adept at explaining ethnic conflict in the periphery. It cannot be denied, however, that the world-system's capitalist dynamics and the actions of the core lie deep at the roots of them both.

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