





INTRODUCTION

Global Social History: Rethinking Class and Social Transformation in the Modern World

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Abstract

The rise of global history has fundamentally reshaped historical scholarship over recent years. Questions about class structures, however, have rarely been specifically addressed by global historians. Scholars of social history, meanwhile, have traditionally studied social stratification within national frameworks. The introduction to this special issue addresses these shortcomings, exploring global social history as a new field of historical inquiry. Interweaving global and social history, it demonstrates that we cannot understand the emergence and transformation of social groups across the modern world – groups such as the aristocracy, the economic bourgeoisie, the educated middle classes, the peasantry, or nomadic groups – without considering how they were influenced by global entanglements. Moreover, it points out that we have to examine globalization as a social process that was shaped by particular social groups. The special issue will connect the study of global connectivity with that of the emergence and evolution of social structures.

The world in the age of empire, even though marked by chauvinism and racism, imperial violence, and forced labour regimes, could also offer social spaces in which actors from different parts of the world could meet on more or less equal terms. Throughout the era, for instance, monarchs, from the Ottoman sultan and the king of Hawai'i to the Persian shah and the king of Siam, mingled in the cosmopolitan courts of Europe.¹ The world of business, too, enabled such cross-continental encounters. The Swiss merchant August Ammann, in the service of his trading house Volkart Brothers, travelled in the 1870s to India, engaging with South Asian merchants; in his reminiscences,

¹ David Motadel, 'Qajar shahs in imperial Germany', *Past and Present*, 213 (2011), pp. 191–235.

he vaunted them as ‘a class of men who would be an ornament to any commercial community in and out of India’.² Similarly, scholars from outside the Western world, such as Bengali literati, creole intellectuals, and Lebanese academics, raised a claim to participate in international scholarly communities as equals.³

Such encounters have not, of course, escaped the attention of scholars, who have described them in various works of global history. In most cases, however, they are presented in the context of the examination of political imperial structures, global capitalist markets, or intellectual spheres. Only rarely have historians inquired whether these interactions relied on a shared cultural vocabulary by which the actors recognized each other as members of a distinct class. Likewise, the question about the ways in which specific actors used their global contacts to ascertain their position within the social hierarchy of their countries has barely been studied systematically.⁴ It is only recently that historians have begun to examine such interactions in an explicit social historical perspective.⁵ Their studies look at the emergence of middle classes in Western and non-Western countries, the interaction of aristocrats and monarchs from around the world, and the global history of labour and working-class communities. In particular, scholars of global labour history and the global history of the peasantry have shown how the emerging capitalist world economy created new – and interrelated – forms of free and unfree labour in different parts of the world.⁶ Around the world, in the nineteenth century, processes of social stratification were often linked to global transformations. They commonly took place at the same sites, such as in the rapidly growing urban regions, where working classes were made, where new middle classes emerged, mingling in spaces such as theatres, operas, and museums, where scientific societies were formed, and where the commodities produced in agrarian

² August F. Ammann, *Reminiscences of an old V.B. partner, special number of the V.B. News, published by Volkart Brothers and devoted to the interests of their employees* (Winterthur, 1921), p. 59.

³ Stefanie Gänger and Su Lin Lewis, ‘Forum: a world of ideas: new pathways in global intellectual history, c. 1880–1930’, *Modern Intellectual History*, 10 (2013), pp. 347–51.

⁴ One of many examples of such a neglect concerns the examination of cosmopolitan networks. The respective studies rarely explicitly investigate whether the self-concept of cosmopolitan actors or their ability to establish transnational networks can be explained by a particular class background. For the history of cosmopolitanism, see Su Lin Lewis, *Cities in motion: urban life and cosmopolitanism in Southeast Asia, 1920–1940* (Cambridge, 2016); Sugata Bose and Kris Manjappa, eds., *Cosmopolitan thought zones: South Asia and the global circulation of ideas* (New York, NY, 2010); Nico Slate, *Colored cosmopolitanism: the shared struggle for freedom in the United States and India* (Cambridge, MA, 2012); and Bernhard Gissibl and Isabella Löhr, eds., *Bessere Welten. Kosmopolitismus in den Geschichtswissenschaften* (Frankfurt, 2017).

⁵ Christof Dejung, David Motadel, and Jürgen Osterhammel, eds., *The global bourgeoisie: the rise of the middle classes in the age of empire* (Princeton, NJ, 2019), for the examination of the middle classes in a global historical context; and Jeroen Duindam, *Dynasties: a global history of power, 1300–1800* (Cambridge, 2015), for the worlds of royalty.

⁶ Marcel van der Linden, *Workers of the world: essays toward a global labor history* (Leiden, 2008), on global labour history; and Eric Vanhaute, *Peasants in world history* (London, 2021), on global peasant history.

hinterlands were channelled to industrial areas by globally operating merchant houses.⁷

The aim of global social history, a field which this special issue aims to establish, is to address such processes of social stratification from a global perspective. Global social history, as a scholarly project, can build on various approaches that have examined the connections between global entanglements and social inequality. Beside the fields of research mentioned above, these include research in social imperialism, subaltern studies, intersectionality, and works inspired by world-system analysis or dependency theory.⁸ Global social history – examining differences and similarities of social stratification in different parts of the world as well as the ways in which social transformations around the world were connected – can enrich our understanding of the modern world and provide new perspectives for fields of research such as economic and social history and the history of imperialism.

Several scholars – among them Jürgen Osterhammel, Patrick Manning, Peter Stearns, Jürgen Kocka, and Lynn Hunt – have long lamented the lack of interest that global historians have shown in social historical questions.⁹ Kenneth Pomeranz noted that ‘world history has much to gain from developing research agendas with a strong social history component and from thinking of social history in broad terms’.¹⁰ Nevertheless, none of these scholars has put forth anything other than general outlines on the use of global historical approaches in the study of social history.¹¹

⁷ Saskia Sassen, *The global city: New York, London, Tokyo* (Princeton, NJ, 1991), for a contemporary account of such processes.

⁸ Prominent examples for studies in social imperialism are Hans-Ulrich Wehler, *Bismarck und der Imperialismus* (Cologne, 1969); and John MacKenzie, *Propaganda and empire: the manipulation of British public opinion, 1880-1960* (Manchester, 1984). For subaltern studies, see David Ludden, *Reading subaltern studies: critical history, contested meaning and the globalization of South Asia* (London, 2002); for intersectionality, see Linda Gordon, ‘“Intersectionality”, socialist feminism and contemporary activism: musings by a second-wave socialist feminist’, *Gender and History*, 28 (2016), pp. 340–57; for world system theory, see Immanuel Wallerstein, *The modern world-system* (4 vols., New York, NY, 1974–2011); and for dependency theory, see Fernando Henrique Cardoso and Enzo Faletto, *Dependency and development in Latin America* (Berkeley, CA, 1979).

⁹ Jürgen Osterhammel, ‘Transnationale Gesellschaftsgeschichte: Erweiterung oder Alternative?’, *Geschichte und Gesellschaft*, 27 (2001), pp. 464–79; Patrick Manning, *Navigating world history: historians create a global past* (New York, NY, 2003), pp. 201–13; Peter Stearns, ‘Social history and world history: toward greater interaction’, *World History Connected*, 2 (2005), <https://worldhistoryconnected.press.uillinois.edu/2.2/stearns.html> (accessed 22 Apr. 2024); Jürgen Kocka, ‘Sozialgeschichte und Globalgeschichte’, in Matthias Middell, ed., *Dimensionen der Kultur- und Gesellschaftsgeschichte. Festschrift für Hannes Siegrist zum 60. Geburtstag* (Leipzig, 2007), pp. 90–101; and Lynn Hunt, *Writing history in the global era* (New York, NY, 2014).

¹⁰ Kenneth Pomeranz, ‘Social history and world history: from daily life to patterns of change’, *Journal of World History*, 28 (2007), pp. 69–98, at p. 70.

¹¹ Jürgen Osterhammel, *The transformation of the world: a global history of the nineteenth century* (Princeton, NJ, 2014), pp. 744–78; and Jürgen Osterhammel, ‘Hierarchies and connections: aspects of a global social history’, in Sebastian Conrad and Jürgen Osterhammel, eds., *An emerging modern world, 1750–1870* (Cambridge, MA, 2018), pp. 661–888, are important exceptions. See also Christof Dejung, ‘Transregional study of class, social groups, and milieus’, in Matthias Middell, ed., *The*

The establishment of such an approach requires some epistemological reflections. Over the last few years, scholars have prefixed established fields of historical research with the adjective 'global' – among them global intellectual history, global labour history, and global urban history – which generally implies the claim to reconceptualize the paradigms of the respective fields in a less Eurocentric manner.¹² In a way, our attempt to establish global social history is part of this trend. This special issue of the *Historical Journal* not only presents accounts of particular social groups but also critically addresses broader problems that emerge when employing Western concepts, such as 'class' or 'society', in the study of the non-Western world. The contributions not only ask whether different social groups across the globe can be analysed with general universal concepts, but also explore the extent to which particular concepts can acquire distinct connotations and levels of significance in different regions and periods.¹³ What does it mean if we use terms such as 'labour' or 'middle class' when studying the non-Western world? To what extent do we need to 'provincialize' these concepts in order to make them suitable for global historical research? And how can social groups that do not figure prominently in Western class analysis – such as 'nomads', 'tribal societies', 'chiefs', 'subalterns', 'castes', 'bandits', and 'pirates' – be integrated into a global social history?

Such questions have been discussed among global historians for a long time. It seems that radical relativism cannot be the answer to the problem of the use of societal categories in global history. There is a tension between the need to sufficiently consider the uniqueness of every geographic space we study and the need to have ecumenical consensus on major historical concepts when writing world history. The contributions to this special issue therefore avoid both hasty assumptions about the similarities between (and comparability of) social groups and simplistic claims of particularities. Moreover, they also look at societies that generally do not figure prominently in social theory and class analysis and that were arguably not (or not significantly) integrated into processes of globalization.

Today, the study of global social history seems particularly topical as class conflicts and income inequality have increased dramatically in many Western countries in the last few years.¹⁴ Arguably, the divergence between the one per cent of the super-rich and the rest of society was not least the product of worldwide transformation such as the deregulation of the global financial industry and an increase in international trade and the global division of labour. The integration of social historical questions into our debates on global history will help us better understand such processes, both past and present.¹⁵

Routledge handbook of transregional studies (Abingdon, 2019), pp. 74–81, for an earlier outline of global social history as a distinct approach.

¹² For the discussion of global urban history, see the contribution of Michael Goebel in this special issue.

¹³ Dipesh Chakrabarty, *Provincializing Europe: postcolonial thought and historical difference* (Princeton, NJ, 2000).

¹⁴ Thomas Piketty, *Capital in the twenty-first century* (Cambridge, MA, 2014).

¹⁵ Geoff Eley, *The future of class in history: what's left of the social?* (Ann Arbor, MI, 2007), on the development of social history after the late twentieth century.

We hope that, in interweaving global and social history, the articles will reshape our understanding of the social transformations of the modern age. The contributions demonstrate that we cannot comprehend the emergence and evolution of social groups across the modern world, such as the aristocracy, the economic bourgeoisie, the educated middle classes, and the peasantry, without considering the impact of global entanglements on class formation. At the same time, they demonstrate that we need to understand globalization as a process which was shaped, above all, by the agency of particular social groups. Overall, the articles show that global and social history can be seen as two approaches that complement each other.

This introduction offers some methodological reflections on the global historical analysis of social stratification. In the first section, we will show that various social groups that were important for the evolution of the modern world were shaped by – or were even the consequence of – global entanglements. In the second section, we will look at some of the challenges that arise when using social historical approaches in global history, and offer some solutions. In particular, we will argue that a global social history will need to take into account the intersection of class analysis with other analytical collective concepts such as ethnicity, gender, and religion. The third section will discuss two possible general theoretical approaches to global social history: world-system analysis, with its focus on global economic integration; and the macro-sociological theory of world society, which focuses on the emergence of a worldwide sphere of communication in the modern age. None of these approaches can be used as a methodical one-size-fits-all tool, of course; rather, they provide heuristic tools that allow us to study the global history of class and social transformation in a more structured manner, as will be pointed out once more in the concluding fourth section.

I

Global social history can draw on a plethora of scholarly approaches that have been devised in the fields of social history, global history, and area-studies history over the past decades. Among them are the theoretical works of the 1970s and 1980s, such as world-system theory or studies on social imperialism which explored how aristocratic and bourgeois elites used imperial propaganda in order to ease social tensions and to integrate the working classes into emerging national communities.¹⁶ Some of these studies took into account global interactions; however, they ultimately lost much of their appeal because of their Eurocentric and rather functionalist orientation, and have therefore been of less interest to scholars of global history in recent years.

Scholars in area studies, for their part, examined relations between particular social groups in specific regional contexts. In most cases, their findings were considered spatially specific, as they framed their work in ways that only occasionally related to social historical developments in other parts of

¹⁶ Wallerstein, *The modern world-system*, for world-system analysis; and Wehler, *Bismarck und der Imperialismus*, and MacKenzie, *Propaganda and empire*, for social imperialism.

the world. One prominent example is the long-time interest of Africanists in the history of the African 'elites', without explicitly comparing these 'elites' to the middle classes in other parts of the Global South, not to mention the middle classes of the Western world.¹⁷ There are exceptions, of course. The most notable is subaltern studies, which, although initially growing out of scholarship on colonial South Asia, has been successfully adapted for the examination of social relations in other parts of the world.¹⁸ The approach of subaltern studies is particularly well suited for an examination of different forms of inequality in a globalized world, due both to its scepticism to imperialism and postcolonial nationalism, and to its attention to epistemological questions.

Global social history can build on these (and other) research traditions and integrate them into a larger analytical framework. What is more, it can tie in with recent initiatives from the fields of sociology, history, and international relations that have suggested global historical sociology as a shared trajectory to investigate the global dynamics that enable the emergence, reproduction, and breakdown of social orders.¹⁹ Still, if global social history is to become a distinct approach to the study of the human past, we need to think about a definition. What is global social history, and how does it differ from, and complement, other approaches of social and global history? A useful starting point can be found in the classic approaches of global history as both the historical study of the world's past through comparison – which allows us to see similarities (and convergences over time) and differences (and divergences over time) in different parts of the world – and also the study of connections (globalization) and disconnections (pre- and deglobalization) across the world.

Within this framework, we are particularly interested in convergences and divergences – what Sebastian Conrad called 'structured transformations on a global level' – over time.²⁰ Global social history can reveal how particular social groups shaped and were shaped by global transformations. Moreover, it can explore how particular social groups – be they merchants, scholars, or elites of tribal societies – established global networks and thus influenced or initiated processes of globalization. In turn, global social history will help us to understand how social structures in different parts of the world were affected by processes of globalization; it will investigate the extent to which social groups and social milieus were produced by global entanglements and the extent to which these groups and milieus had to adapt to globalization in order to maintain their status within their societies.

A conjuncture of social transformation with an increase of global connections can certainly be observed after the seventeenth century, with the

¹⁷ Carola Lentz, 'African middle classes: lessons from transnational studies and a research agenda', in Henning Melber, ed., *The rise of Africa's middle class* (London, 2016), pp. 17–53; and Daniel Tödt, *The Lumumba generation: African bourgeoisie and colonial distinction in the Belgian Congo* (Berlin, 2021).

¹⁸ Ranajit Guha and Gayatri Chakravorty Spivak, eds., *Selected subaltern studies* (Delhi, 1988); and Ludden, *Reading subaltern studies*.

¹⁹ Julian Go and George Lawson, eds., *Global historical sociology* (Cambridge, 2017).

²⁰ Sebastian Conrad, *What is global history?* (Princeton, NJ, 2016), p. 62.

emergence of a capitalist world economy, the impact of colonial plantation goods on European and North American consumer markets, the closer symbiosis between metropolitan capital and the ambitions of imperial governments, and the increasing importance of overseas inventories and inventions for scholarly knowledge. These processes accelerated and became ever more important after the dual revolution of the eighteenth century. The global social transformations of the modern period are closely linked to the expansion of Europe. Yet, non-European societies and social actors were by no means mere bystanders or victims of European imperialism, despite the violence of colonial rule. Some of them successfully adapted to European hegemony and pursued political and economic goals of their own. Time and again, non-European actors also played crucial roles in processes of globalization, as has been shown for instance in the case of the interaction between European and Asian businessmen across the Indian Ocean, the role of tribal societies in the caravan trade in Central Asia or West Africa, or the establishment of trade links across North America.²¹

Studying the influence of global connections on the emergence and transformation of classes and social milieus is compatible with the works of both global and social historians who share an interest in the ways in which specific social structures were shaped by human interactions. Even though the nature of such entanglements is often only vaguely defined, there seems to be a consensus among scholars that interconnectivity is the *raison d'être* of global historical studies and that the ever-growing density of long-distance interconnections – both through face-to-face encounters and by acts of communication – can be considered evidence of the emergence of a globalized world.²² A similar interest in human interaction can be observed in social history. Over more than half a century, social historians have now studied the ways in which affiliation to a particular class was, at least partly, an outcome of the self-fashioning and strategic behaviour of social actors. In his seminal study on *The making of the English working class*, E. P. Thompson pointed out that ‘The working class made itself as much as it was made.’²³ Similarly, Georg Simmel argued that social theory should focus on processes of *Vergesellschaftung* (communalization or social integration), as he considered social order to be neither static nor the function of specific income structures but a process-related issue and the result of social interaction.²⁴

²¹ For Asian trade networks, see Rajat Kanta Ray, ‘Asian capital in the age of European domination: the rise of the bazaar, 1800–1914’, *Modern Asian Studies*, 29 (1995), pp. 449–554. For the role of tribal societies in long-distance trade relations, see Ghislaine Lydon, *On trans-Saharan trails: Islamic law, trade networks, and cross-cultural exchange in nineteenth-century western Africa* (Cambridge, 2009); and Roberts D. Crews, *Afghan modern: the history of a global nation* (Cambridge, MA, 2015). For trade links in North America, see Pekka Hämäläinen, *Lakota America: a new history of indigenous power* (New Haven, CT, 2019).

²² Sanjay Subrahmanyam, ‘Connected histories: notes towards a reconfiguration of early modern Eurasia’, *Modern Asian Studies*, 31 (1997), pp. 735–62; and C. A. Bayly, *The birth of the modern world, 1780–1914: global connections and comparisons* (Oxford, 2004).

²³ E. P. Thompson, *The making of the English working class* (London, 1963), p. 194.

²⁴ Georg Simmel, *Soziologie. Untersuchungen über die Formen der Vergesellschaftung* (Leipzig, 1908).

Global historians have presented various examples that highlight the role of global interconnection for both the emergence and the transformation of particular social groups. In their contribution to this special issue, Eric Vanhaute and Claudia Bernardi examine how rural peripheries in the Global South were transformed by the increased commodification of agriculture after the mid-nineteenth century; this global enclosure, as agrarian historians called it, was the result of the influx of metropolitan capital on the one hand and the establishment of imperial tax regimes and land rights on the other. This transformation of the countryside through the commodification of land and labour went along with the spread of capitalist social relations, including privatized credit and the private ownership of land. The momentous process of remaking peasants into cultivators and eventually consumers of commodities was supported by the spread of a variety of labour regimes, such as sharecropping, family yeoman farming, and proletarian agricultural labour.²⁵ Similarly, scholars of global labour history have explored the interconnection of labour regimes in different parts of the world. Forced and 'voluntary' forms of migration – such as transatlantic slavery, the Asian coolie trade, and, after the mid-nineteenth century, the emigration of millions of European poor to the Americas and Australia – resulted in the emergence of new labour communities in different parts of the world.²⁶ Even if they often lacked class consciousness, these labour communities were distinct social groups, sharing similar conditions of life that were influenced by the emergence of the capitalist world economy and the breakthrough of industrial production.

Likewise, studies on the history of monarchy have revealed how, in the age of empire, both European and non-European rulers were compelled to reconsider their social position in the face of an ever more globalized world, which was increasingly coming under European dominance. Non-European monarchs such as the Persian shahs or the king of Hawai'i attempted to resist the expansion of the Western powers by establishing links to European monarchies, as David Motadel's contribution points out. European sovereigns, for their part, not only encountered differences in terms of culture and skin colour when face to face with their non-European counterparts but also detected remarkable social similarities between them. All over the world, societies were organized hierarchically, with chiefs, emperors and empresses, and kings and queens on top.²⁷ Of course, there was also remarkable social, cultural, and

²⁵ For this development, see also Farshad Araghi, 'The great global enclosure of our times: peasants and the agrarian question at the end of the twentieth century', in Fred Magdoff, John Bellamy Foster, and Frederick H. Buttel, eds., *Hungry for profit: the agribusiness threat to farmers, food and the environment* (New York, NY, 1999), pp. 145–60; and Vanhaute, *Peasants in world history*.

²⁶ Richard Drayton, 'The collaboration of labour: slaves, empires, and globalizations in the Atlantic world, c. 1600–1850', in A. G. Hopkins, ed., *Globalization in world history* (London, 2002), pp. 98–114; Jan Lucassen, ed., *Global labour history: a state of the art* (Bern, 2006); van der Linden, *Workers of the world*; and Andreas Eckert, 'What is global labour history good for?', in Jürgen Kocka, ed., *Work in a modern society: the German historical experience in comparative perspective* (Oxford, 2010), pp. 169–81.

²⁷ David Cannadine, *Ornamentalism: how the British saw their empire* (London, 2001); and, within Europe, Dominic Lieven, *The aristocracy in Europe, 1815–1914* (New York, NY, 1992).

political diversity among princes and aristocracies worldwide. Africanists, for instance, have discussed whether the term 'chiefdom' should be distinguished from that of 'kingdom' and how both of these terms relate to the concept of the 'state' – thus cautioning against the uncritical adaption of such terms as universal concepts.²⁸ In his contribution on early modern courts, Jeroen Duindam looks at differences in the status, recruitment, and legitimation of monarchies in different parts of the world. These differences were exaggerated, for example, in orientalist discourse, from Machiavelli to Montesquieu, whereas travellers recognized the familiar elite styles and readily used European terminology to describe distant aristocratic elites. Moreover, he argues that the urgency of the reforms which European courts faced after the 1750s were almost unparalleled. The *Sattelzeit*, indeed, can be seen as the defining moment of the great divergence in terms of the relation between aristocratic rulers and the societies in which they were living.

While all of these social formations – peasants, workers, and aristocrats – existed long before the intensifications of global interaction during the long nineteenth century, the bourgeois middle classes were a social group that emerged precisely in that period and came into being, at least partially, as a product of globalization and colonialism.²⁹ As the global historical examination of the rise of the middle classes is exceptionally well suited for discussing the opportunities and risks of global social history, we will look at it in more detail.

For a long time, social historians were convinced that there were no social formations beyond the North Atlantic world that could be compared to the European or North American bourgeoisies and middle classes.³⁰ Recent scholarship, however, has identified the emergence of social formations that can be compared to the Euro-American middle class in places as different as China, India, Peru, Egypt, and Ethiopia.³¹ However, a fundamental challenge is the creation of a definition of middle class that is applicable worldwide. In contrast to the aristocracy or the working class, the bourgeois middle class could neither be characterized by well-defined privileges acquired by birth or particular political interest, nor be distinguished clearly from other social groups by their socio-economic status. This problem was discussed among social historians of Europe during the twentieth century and has now grown even more acute with the examination of middle classes in the non-Western world.

²⁸ Petr Sklaník, 'Chiefdom: a universal political formation?', *Focaal: European Journal of Anthropology*, 43 (2004), pp. 76–98.

²⁹ Dejung, Motadel, and Osterhammel, eds., *The global bourgeoisie*.

³⁰ Hannes Siegrist, 'Bourgeoisie/middle classes, history', in Neil J. Smelser and Paul B. Baltes, eds., *International encyclopedia of the social and behavioral sciences* (Amsterdam, 2001), pp. 1307–14, esp. p. 1312. The terms 'bourgeoisie' and 'middle classes' will be used synonymously in this article.

³¹ See, among others, Marie-Claire Bergère, *The golden age of the Chinese bourgeoisie, 1911–1937* (Cambridge, 1989); David S. Parker, *The idea of the middle class: white-collar workers and Peruvian society, 1900–1950* (University Park, PA, 1998); Michael O. West, *The rise of the African middle class: colonial Zimbabwe, 1898–1965* (Bloomington, IN, 2002); Keith David Watenpaugh, *Being modern in the Middle East: revolution, nationalism, colonialism, and the Arab middle class* (Princeton, NJ, 2006); Margrit Pernau, *Ashraf into middle classes: Muslims in nineteenth-century Delhi* (Oxford, 2013); and Toufoull Abou-Hodeib, *A taste for home: the modern middle class in Ottoman Beirut* (Stanford, CA, 2017).

European social historians presented a pragmatic solution to the dilemma. They pointed out that affiliation to this social group depended not least on the acceptance of a specific moral-cultural canon and a certain way of living.³² This conception has proved to be suitable for global histories of the middle classes as well. Middling sorts throughout the non-Western world shared much with the Western middle classes in terms of their cultural orientation.³³ The middle classes that emerged throughout the long nineteenth century were intrinsically linked to globalization. In fact, they were in many ways the product of global entanglements. This is certainly true for the middle classes in Europe's colonies, often educated in missionary schools or Western local schools. Looking at the emergence of the Indian middle classes as an exemplary case, scholars have demonstrated that this group developed their hegemony within local society from a position of colonial subalternity. Moreover, historians have claimed that the social identity of these groups often relied on an imitation of Western archetypes; Partha Chatterjee famously spoke about a 'derivative discourse'.³⁴

This notion has recently been challenged. Sanjay Joshi argues that the emergence of an Indian middle class cannot be reduced to an adoption of Western models.³⁵ Such a notion, in his eyes, disregards the agency of this social group and does not take into account the fact that their self-fashioning relied on vernacular notions of political and social organization. Similar processes can be observed across the non-Western world. Accordingly, the emergence of non-Western middle classes can be interpreted as a hybrid mix of local traditions and influences from abroad.

A similar case can be made for the European middle classes, as recent works have shown that their cultural canopy had, in fact, a global span.³⁶ Business elites, which were an integral part of the European bourgeoisie, were generally part of global economic networks.³⁷ What is more, bourgeois culture relied on the consumption of commodities imported from colonial possessions, such as sugar, tea, cocoa, coffee, and silk, and often involved the observation of exotic plants and animals by visiting zoological and botanical gardens.³⁸ European

³² On bourgeois culture, see Manfred Hettling and Stefan-Ludwig Hoffmann, eds., *Der bürgerliche Werthimmel. Innenansichten des 19. Jahrhunderts* (Göttingen, 2000); Linda Young, *Middle-class culture in the nineteenth century* (New York, NY, 2003); and Jerrold Seigel, *Modernity and bourgeois life: society, politics, and culture in England, France, and Germany since 1750* (Cambridge, 2012).

³³ A. Ricardo López and Barbara Weinstein, eds., *The making of the middle class: toward a transnational history* (Durham, NC, 2012); and Dejung, Motadel, and Osterhammel, eds., *The global bourgeoisie*.

³⁴ Partha Chatterjee, *Nationalist thought and the colonial world: a derivative discourse?* (London, 1986); and Partha Chatterjee, *The nation and its fragments: colonial and postcolonial histories* (Princeton, NJ, 1993).

³⁵ Sanjay Joshi, *Fractured modernity: making of a middle class in colonial North India* (Oxford, 2001).

³⁶ Frederick Cooper and Ann Laura Stoler, eds., *Tensions of empire: colonial cultures in a bourgeois world* (Berkeley, CA, 1997).

³⁷ Charles A. Jones, *International business in the nineteenth century: the rise and fall of a cosmopolitan bourgeoisie* (Brighton, 1987); and Christof Dejung, *Commodity trading, globalization, and the colonial world: spinning the web of the global market* (New York, NY, 2018).

³⁸ Catherine Hall and Sonya O. Rose, eds., *At home with the empire: metropolitan culture and the imperial world* (Cambridge, 2006), among others.

middle classes also regularly compared the stage of development that Western civilization had reached to that of allegedly 'primitive' societies on the colonial fringes.³⁹

The rise of the middle classes in different parts of the world can thus be seen as a consequence of global entanglements rather than as a diffusion of a European bourgeois lifestyle all over the world. This exchange process, however, did not take place on a level playing field, but in the context of Western dominance and imperialism. Time and time again, colonial middle classes saw their ideals of political freedom and their aspirations to be part of a global process of modernization undermined by imperial hubris and racism. And whereas colonial middle classes generally took the European middle classes as a yardstick, this was obviously not the case the other way round.

The recent interest in non-Western middle classes is instructive as, for a long time, scholars in area studies and anticolonial theorists such as Frantz Fanon considered the non-Western bourgeoisies as collaborators with European imperialists and as sycophants merely interested in their own gain.⁴⁰ Following the disillusionment with the elites in the Global South after decolonization, scholars in subaltern studies and postcolonial theory began to focus on the peasantry in order to devise new approaches that could challenge Eurocentric models of development and historical research. As a consequence, in works of South Asian, African, and South American social history, peasants and subaltern groups became talismanic in the search for a new political subject. In contrast, the new interest of area-studies scholars in the emergence of colonial middle classes is connected to the debates about the emergence of 'new middle classes' in the Global South after the end of the Cold War.⁴¹ Still, it is worth noting that these studies are generally rather sceptical of the liberal claim that the rise of the middle classes in regions such as Africa, Asia, and Latin America is evidence for the fact that these parts of the world would finally develop according to the 'Western' model. As these examples reveal, however, it is worth paying attention to historiographical trends and considering the reasons for the prominence of particular social groups (and the neglecting of other groups) in historical studies at certain times (and in certain historical contexts).

³⁹ For the history of anthropology, see, among others, Henrika Kuklick, ed., *A new history of anthropology* (Malden, MA, 2008).

⁴⁰ Frantz Fanon, *The wretched of the earth* (New York, NY, 1963).

⁴¹ Among the most important studies are Rachel Heiman, Carla Freeman, and Mark Liechty, eds., *The global middle classes: theorizing through ethnography* (Santa Fe, NM, 2012); Jie Chen, *A middle class without democracy: economic growth and the prospects for democratization in China* (Oxford, 2014); Henrike Donner, ed., *Being middle-class in India: a way of life* (London, 2011); Diane E. Davis, *Discipline and development: middle classes and prosperity in East Asia and Latin America* (Cambridge, 2004); Vali Nasr, *Forces of fortune: the rise of the new Muslim middle class and what it will mean for our world* (New York, NY, 2009); Henning Melber, ed., *The rise of Africa's middle class* (London, 2016); and Lena Kroeker, David O'Kane, and Tabea Scharrer, *Middle classes in Africa: changing lives and conceptual challenges* (Basingstoke, 2018). Abhijit V. Banerjee and Esther Duflo, 'What is middle class about the middle classes around the world?', *Journal of Economic Perspectives*, 22 (2008), pp. 3–28, point out common features of the middle classes in the Global South.

Taken together, recent research in labour history and studies of groups such as the aristocracy, the peasantry, or the middle classes have provided ample evidence that show that these social groups shaped, and were considerably shaped by, global entanglements. To be sure, all of these groups were also influenced by local, national, and regional conditions and power struggles, and the relation between local conditions and global influences has to be examined in each and every case by meticulous research.

The relation between global and local conditions in particular has been addressed in several publications.⁴² Scholars have, for example, shown much interest in nodes of global entanglement, such as port cities.⁴³ A global historical account may reveal that such localities were characterized by specific processes of stratification that influenced both the social order in the respective city and worldwide social structures. In his contribution, Michael Goebel examines the close interrelation between urbanization and the emergence of middle classes across the world in the long nineteenth century and argues that social history is indispensable for a better understanding of globalization. Such an approach could also be used to explore whether conflicts and frictions between particular social groups are specific to particular regions of the planet, or whether they can be compared to similar processes in other parts of the world. For instance, bourgeois civilizing missions which aimed at the education of urban and rural subaltern classes and their integration within modern society can be found in cities as far apart as London, Bombay, and Aleppo.⁴⁴ And entrenched aristocratic elites had to react to the social transformations of the long nineteenth century, in particular to the rise of the middle classes, in regions as different as the Ottoman Empire, Persia, and Germany.⁴⁵ It might be worthwhile analysing both the similarities and the differences between societal developments that took place in different parts of the globe and to explore whether they can be integrated into an overarching conceptual framework of global social history.

A further trajectory concerns the ways in which social history might be linked to the history of political territorialization. From works on social imperialism to subaltern studies, scholarship has shown how imperialism could affect social stratification in different parts of the world; and, vice versa, imperial politics could arguably also be shaped by particular social groups. Theories of imperialism brought forward by writers such as John

⁴² Angelika Epple, 'Lokalität und die Dimensionen des Globalen: eine Frage der Relationen', *Historische Anthropologie*, 21 (2013), pp. 4-25; and the contributions in John-Paul Ghobrial, ed., *Global history and microhistory, Past and Present* supplement 14 (2019), among others.

⁴³ John Darwin, *Unlocking the world: port cities and globalization in the age of steam, 1830-1930* (London, 2020).

⁴⁴ Catherine Hall, *Civilizing subjects: metropole and colony in the English imagination, 1830-1867* (Cambridge, 2002); Carey A. Watt and Michael Mann, eds., *Civilizing missions in colonial and post-colonial South Asia: from improvement to development* (London, 2011); and Prashant Kidambi, *The making of an Indian metropolis: colonial governance and public culture in Bombay, 1890-1920* (Aldershot, 2007).

⁴⁵ See Müge Fatma Göçek, *Rise of the bourgeoisie, demise of empire: Ottoman Westernization and social change* (Oxford, 1996), for the Ottoman Empire; and Cyrus Schayegh, *Who is knowledgeable is strong: science, class, and the formation of modern Iranian society, 1900-1950* (Berkeley, CA, 2009), for Persia.

A. Hobson, Rosa Luxemburg, and Lenin argued that imperial expansion was motivated by the ambitions of capitalist entrepreneurs to open up new overseas markets.⁴⁶ For the British empire, a similar argument has been put forth by Peter Cain and Anthony Hopkins in their 'Gentlemanly capitalism'.⁴⁷ Moreover, social history has also been used to study the formation of nation-states. Scholars famously argued that, in Europe, nationalism had been stabilized by culture, including invented traditions that helped integrate different social groups into a national community.⁴⁸ Likewise, the rise of anticolonial nationalism in the Global South may be examined within a social historical framework. Ranajit Guha, for instance, cautions against the elitism that characterized the nationalist historiography of a country such as India after independence and maintains that the struggle against colonial rule and the establishment of Indian nationalist consciousness did not result from middle-class agency alone. Rather, we have to take into account the contribution of 'the subaltern classes and groups constituting the mass of the labouring population and the intermediate strata in town and country – that is, the people'.⁴⁹ A similar claim has been made for anticolonial mobilization in sub-Saharan Africa after the Second World War. This mobilization relied on both the activities of Western-educated elites (that is, the middle classes) and the agitation of the rural population. Elizabeth Schmidt has thus argued that anticolonial nationalism should be considered a conjunction between top-down and bottom-up processes.⁵⁰ Global social history studies could adopt this approach as a methodological tool for the comparative examination of national mobilization in both the Global North and the Global South.

II

A global history of the emergence of social groups, classes, and milieus can certainly not merely adopt the concepts of social theory that were established for the examination of Western societies. Rather, the concepts will have to be adapted to be applicable for the analysis of the modern globalized world characterized by imperialism, racism, and global interdependencies. Scholars of global labour history, for instance, have had to acknowledge that basic concepts of conventional labour history, which assumed the prevalence of paid

⁴⁶ John Atkinson Hobson, *Imperialism: a study* (New York, NY, 1902); Rosa Luxemburg, *Die Akkumulation des Kapitals* (Berlin, 1913). Vladimir Ilyich Lenin, *Imperialism: the latest stage of capitalism* (New York, NY, 1939; orig. edn 1916).

⁴⁷ Peter J. Cain and Anthony G. Hopkins, 'Gentlemanly capitalism and British expansion overseas I: the old colonial system, 1688–1850', *Economic History Review*, n.s. 39 (1986), pp. 501–25; and Peter J. Cain and Anthony G. Hopkins, 'Gentlemanly capitalism and British expansion overseas II: new imperialism, 1850–1945', *Economic History Review*, n.s. 40 (1987), pp. 1–26.

⁴⁸ A classic intervention is, of course, Eric Hobsbawm and Terence Ranger, eds., *The invention of tradition* (Cambridge, 1983).

⁴⁹ Ranajit Guha, 'On some aspects of the historiography of colonial India', in Guha and Spivak, eds., *Selected subaltern studies*, pp. 37–44, at p. 40.

⁵⁰ Elizabeth Schmidt, 'Top down or bottom up? Nationalist mobilization reconsidered, with special reference to Guinea (French West Africa)', *American Historical Review*, 110 (2005), pp. 975–1014.

labour, have not been sufficient to explore global economic connections.⁵¹ Often, it turned out, industrial labour in the Global North relied on unfree labour conditions in the Global South.⁵² Likewise, idealistic presumptions of international workers' solidarity were thwarted by the fact that established labour forces in particular areas often vehemently opposed the influx of foreign workers and supported xenophobic policies.⁵³

In a similar vein, the idea that middle classes are proponents of liberalism and social modernization stands in stark contradiction to the fact that the European middle classes emerged as a distinct social group in the age of empire, supported the colonial enterprise, with its regimes of economic exploitation, authoritarian rule, and civilizing missions, and closed their eyes to imperial violence.⁵⁴ Such acts of discrimination and repression can be considered the dark side of the ideology of modernity and of the bourgeois quest for universal equality and progress. In particular, colonialism discloses the inherent contradictions of the bourgeois project, as Frederick Cooper and Ann Laura Stoler pointed out, because colonial racism stood in obvious contrast to the ideal of universal equality of all humans.⁵⁵

These examples show that the introduction of concepts that have their origin in Euro-American social theory to global history comes with several challenges. However, the fact that global historical studies may point out biases in the ways in which particular social groups, such as the middle classes, or processes, such as labour relations, were conceptualized in social theory is one of the field's strengths. As a consequence, a reconfiguration of social categories is required in order to making them meaningful tools for the study of the worlds of the Global South on the one hand, and for examining processes of globalization on the other.⁵⁶ There are a number of further challenges that a global social history has to take into account, however. First, there is the problem of terminology. It should be obvious that sociological-historical concepts of western European origin, such as the bourgeoisie or the middle class, cannot always be smoothly applied to non-European history. After all, one important epistemological problem of comparisons is that of selectively looking for analogies while overlooking important differences between Western and non-Western societies. There is also the risk that the application of Western

⁵¹ Van der Linden, *Workers of the world*; and Eckert, 'What is global labour history good for?.'

⁵² Andrew Zimmerman, *From industrial education for the new South to a sociology of the Global South* (Princeton, NJ, 2010); Giorgio Riello, *Cotton: the fabric that made the modern world* (Cambridge, 2013); and Sven Beckert, *Empire of cotton: a global history* (New York, NY, 2014).

⁵³ For anti-immigrant nativism, see Rober Brubaker, 'Ethnicity without groups', *Archive of European Sociology*, 43 (2002), pp. 163–89; Leo Lucassen, *The immigrant threat: the integration of old and new migrants in western Europe since 1850* (Urbana, IL, 2005); and Aristide Zolberg, *A nation by design: immigration policy in the fashioning of America* (Cambridge, MA, 2006).

⁵⁴ Christof Dejung, 'From global civilizing missions to racial warfare: class conflicts and the representation of the colonial world in European middle-class thought', in Dejung, Motadel, and Osterhammel, eds., *The global bourgeoisie*, pp. 251–71.

⁵⁵ Ann Laura Stoler and Frederick Cooper, 'Between metropole and colony: rethinking a research agenda', in Cooper and Stoler, *Tensions of empire*, pp. 1–56.

⁵⁶ Jean Comaroff and John L. Comaroff, *Theory from the south: or, how Euro-America is evolving toward Africa* (London, 2012).

models to non-Western societies results in seeing the history of most of the world in terms of a deficiency: for example, in terms of a lack of the right social classes. Yet completely renouncing global comparisons for this reason would reinforce the othering of non-Western societies and possibly even exoticize them further. Without the adoption of common terms, cross-regional comparisons would be rendered impossible, which is why such terms can be considered as 'both inadequate and indispensable', as Dipesh Chakrabarty famously put it.⁵⁷

Second, there is an implicit teleology in many global historical works, and particularly in macro-historical and macro-sociological studies, such as world-system theory. Much of this research tends to assume that globalization is an inevitable process. Frederick Cooper rightly warned about such a teleological bias and argued that historians must be open to discrepancies, asynchronies, and dead ends in global entanglements.⁵⁸ What is more, global social history will have to be cautious of any idealistic narratives of class consciousness and identity, and attentive to discrepancies and ambiguities in regard to processes of stratification and social conflicts from the local to the global level.

Third, not all historical actors can be fitted into categories of class established in Euro-American social theory. For this reason, global social history cannot content itself with applying the classic triads of social theory – working class, bourgeoisie, and aristocracy – at a global level. Even for the examination of European societies, this scheme proves to be insufficient. There has been a long debate, for instance among Marxist theorists, on how to integrate agriculture and the rural population into the analysis of industrial-capitalist societies.⁵⁹ There are numerous other groups that do not seem to fit into such a class system at all, among them the European lumpenproletariat, travellers, vagabonds, and bandits.⁶⁰

The existence of groups that elude a conventional class order obviously becomes even more of a challenge for global historians. Francesca Fuoli's article in this issue offers a global historical examination of banditry and points to the social transformations that made for the emergence of bandits as a social group. Another interesting example is that of tribal societies. Of course, the very term 'tribal societies' is not unproblematic as it encompasses very different groups living in different parts of the world, from tribes in the North American plains to Central Highlands clans in Afghanistan, and from nomadic peoples in the Sahara to the tribes of the Brazilian rainforest. As Elisabeth Leake's contribution shows, the term was coined in the nineteenth century in order to designate non-sedentary peoples who, in the eyes of European

⁵⁷ Chakrabarty, *Provincializing Europe*, p. 16.

⁵⁸ Frederick Cooper, 'What is the concept of globalization good for? An African historian's perspective', *African Affairs*, 100 (2001), pp. 189–213.

⁵⁹ Juri Auderset and Peter Moser, *Die Agrarfrage in der Industriegesellschaft. Wissenskulturen, Machtverhältnisse und natürliche Ressourcen in der agrarisch-industriellen Wissensgesellschaft (1850–1950)* (Vienna, 2018).

⁶⁰ Classic studies that aimed to integrate bandits and vagabonds into Marxist theory are Eric J. Hobsbawm, *Bandits* (London, 2010); and Eric J. Hobsbawm, *Primitive rebels: studies in archaic forms of social movement in the nineteenth and twentieth centuries* (London, 2017).

officials and scholars, lived at a rather primitive stage of culture and adhered to archaic customs. A global historical account of such tribal societies, however, may reveal that, despite their differences, there could also be some similarities between how they were integrated in global networks or reacted to European expansion.

Historians have demonstrated that, contrary to conventional wisdom, tribal societies were by no means stagnant or merely inward-looking. In fact, many of these societies took an active part in global interactions. Scholars have thus challenged the idea of early modern and modern Afghanistan as a country characterized by isolation, violence, and divisive tribalism. Many Afghans, not just elites, were connected to the wider world as entrepreneurs, traders, scholars, pilgrims, or soldiers, and were thus important agents of globalization.⁶¹ Similarly, Pekka Hämäläinen has pointed out that North American tribal communities such as the Lakota were not hapless victims of European expansion but could use the rivalries between different European powers on their continent to stabilize their political power well into the second part of the nineteenth century, and successfully integrated European merchants who were looking for goods in the American interior into their own trading networks, for instance in the fur trade.⁶²

Other communities that do not easily fit into a Western class system include groups as diverse as the bureaucrats of the imperial Chinese state, Buddhist monks, and savants and healers who relied on vernacular traditions rather than on the global circulation of goods and ideas. The fact that not all historical actors participated in global exchanges, however, is not an argument against a global social history. Rather, it is a reminder that our conceptual approaches should be used primarily in a heuristic manner and always need to be adapted to and challenged by the empirical evidence.

Another challenge to global social history is the integration of race, religion, and gender into the analysis of class relations. Feminist historians, for instance, have pointed to the importance of gender relations in the emergence of particular classes, such as the working class or the bourgeoisie, and for the everyday life experience of their members.⁶³ In aristocratic rule, hereditary bloodlines were often considered more important than gender, which is why, throughout history, female monarchs could assume political power.⁶⁴

⁶¹ B. D. Hopkins, *The making of modern Afghanistan* (Basingstoke, 2008); Crews, *Afghan modern*; Elisabeth Leake, *The defiant border: the Afghan-Pakistan borderlands in the era of decolonization, 1936–65* (New York, NY, 2017); and Francesca Fuoli, 'Incorporating north-western Afghanistan into the British empire: experiments in indirect rule through the making of an imperial frontier, 1884–87', *Afghanistan*, 1 (2018), pp. 4–25.

⁶² Hämäläinen, *Lakota America*.

⁶³ Kathleen Canning, *Languages of labor and gender: female factory work in Germany, 1850–1914* (Ithaca, NY, 1996), for labour history; and Gunilla-Friederike Budde, 'Bürgerinnen in der Bürgergesellschaft', in Peter Lundgreen, ed., *Sozial- und Kulturgeschichte des Bürgertums. Eine Bilanz des Bielefelder Sonderforschungsbereichs (1986–1997)* (Göttingen, 2000), pp. 249–71, for the history of the middle classes, among others.

⁶⁴ Cristy Beemer, 'The female monarchy: a rhetorical strategy of early modern rule', *Rhetoric Review*, 30 (2011), pp. 258–74; and William Monter, *The rise of female kings in Europe, 1300–1800* (New Haven, CT, 2012).

Leonore Davidoff and Catherine Hall have claimed that gender and class always operate together, and thus that, ultimately, gender history needs to be an integral part of any social history, without exception.⁶⁵ This is to some extent also true for global social history; indeed, global social history offers the opportunity for more pronounced analyses of gender relations in global history, the omission of which has been repeatedly criticized over the last few years.⁶⁶

For a long time, relations between class and ethnicity have received relatively little attention within social history, which may in part be explained by the fact that social history was originally developed in the field of European history. Still, the works of historians who have paid attention to this relationship, such as David Cannadine's study of the aristocratic elites within the British empire, suggest that the intersection of ethnicity and class is essential for understanding global class relations.⁶⁷ In a global environment, specific social milieus could enable individuals of different ethnic origins to merge. That said, colonial historians have also pointed to the conflicts between white and non-white members of the same classes in the Global South. On the other hand, white subalterns – such as jobless seamen, criminals, vagabonds, and prostitutes – living in colonial dependencies were a constant nuisance for colonial governments, as they undermined the notion of white supremacy that was one of the pillars of imperial rule.⁶⁸

Religion is another factor that has to be considered an integral part of global social history. There is a growing body of social histories that take religion seriously and demonstrate the importance of religion in class formation.⁶⁹ Historians have thereby also shown that social milieus could allow members of different religious communities to mingle, highlighting the potential integrative function of social collectives. The most prominent example is the acculturation of Jews into western Europe's bourgeois middle classes in the long nineteenth century.⁷⁰ A global social history might offer a comprehensive look at the importance of religion in class formation around the world.

⁶⁵ Leonore Davidoff and Catherine Hall, *Family fortunes: men and women of the English middle class, 1780–1850* (London, 1987). A classic intervention for such an approach is, of course, Joan Scott, 'Gender: a useful category of historical analysis', *American Historical Review*, 91 (1986), pp. 1053–75.

⁶⁶ See, among others, Merry Wiesner-Hanks, 'World history and the history of women, gender, and sexuality', *Journal of World History*, 18 (2007), pp. 53–67; and Angelika Epple, 'Globalgeschichte und Geschlechtergeschichte: eine Beziehung mit grosser Zukunft', in *L'Homme. Europäische Zeitschrift für feministische Geschichtswissenschaft*, 23 (2012), pp. 87–100.

⁶⁷ Cannadine, *Ornamentalism*.

⁶⁸ Harald Fischer-Tiné, *Low and licentious Europeans: race, class and 'white subalternity' in colonial India* (New Delhi, 2009).

⁶⁹ Frank-Michael Kuhlemann, 'Bürgertum und Religion', in Lundgreen, ed., *Sozial- und Kulturgeschichte*, pp. 293–318, offers an overview. The importance of religion in class formation outside Europe is emphasized in Pernau, *Ashraf into middle classes*.

⁷⁰ Simone Lässig, *Jüdische Wege ins Bürgertum. Kulturelles Kapital und sozialer Aufstieg im 19. Jahrhundert* (Göttingen, 2004), is the most comprehensive study of this phenomenon. Similar arguments can be found in Michael Meyer, *The origins of the modern Jew: Jewish identity and European culture in Germany, 1749–1824* (Detroit, MI, 1967); and Till van Rahden, *Juden und andere Breslauer. Die Beziehungen zwischen Juden, Protestanten und Katholiken in einer deutschen Großstadt von 1860 bis 1925* (Göttingen, 2000).

Moreover, it would allow us to study the impact of shared religion or religious differences on the interactions between members of specific social groups. Muslim bourgeois middle-class migrants, for example, were often able to acculturate within the social milieu of Europe's metropolitan middle classes relatively seamlessly.⁷¹ Similar interactions within social groups – and across religious boundaries – can be observed around the world.

Finally, there has been a growing interest in the intersection of race, religion, gender, and class within the structures of societies. This has been the case, for instance, in both American and colonial history. Here, discrimination against women of colour has been the focus of feminist research for a long time.⁷² Another topic concerns the use of xenophobia by economic elites in order to divide and control labour communities of different ethnic backgrounds.⁷³ As imperial racism structured worldwide interactions to a considerable extent, particularly after the eighteenth century, a global social history will need to take into account this intersectionality, as Merry Wiesner-Hanks points out in her contribution.⁷⁴ Global social historians might intervene in these debates by pointing out that, even in the age of empire, a shared class background could be the basis for the interaction of social actors of different religions and ethnicities from different parts of the world. Global social history allows us to compare the ways in which race, religion, and gender structured social stratification and identities in different regions.

III

A challenge to global social history is the lack of an overarching framework. Conventional social history could use the nation-state as a historiographical laboratory to study the relation between economic development and social stratification. A world society – an entity comparable to national and imperial societies – would be difficult to conceptualize as there are no institutions, associations, or political parties on a global level that could be compared to those established within distinct states. Nevertheless, it might be worthwhile to consider whether particular concepts of global social integration could be adopted for such an approach, not in the hope of constructing an all-inclusive theory but in order to describe more precisely what we mean by global

⁷¹ David Motadel, 'Worlds of a Muslim bourgeoisie: the socio-cultural milieu of the Islamic community in interwar Berlin', in Dejung, Motadel, and Osterhammel, eds., *The global bourgeoisie*, pp. 229–50.

⁷² The article that initiated this debate was Kimberlé Crenshaw, 'Demarginalizing the intersection of race and sex: a black feminist critique of antidiscrimination doctrine', *University of Chicago Legal Forum*, 1 (1989), pp. 139–67.

⁷³ Henry Louis Gates, *Stony the road: Reconstruction, white supremacy, and the rise of Jim Crow* (New York, NY, 2019), on the United States during Reconstruction.

⁷⁴ Jana Tschuren, 'Intersectionality, feminist theory, and global history', in Vera Kallenberg, Jennifer Meyer, and Johanna M. Müller, eds., *Intersectionality und Kritik. Neue Perspektiven für alte Fragen* (Wiesbaden, 2013), pp. 265–82, on the question of how intersectionality could be adapted in global historical research.

entanglements, to determine which processes underpinned the establishment of global structures, and to discuss how they influenced local societies.

A first option is world-system analysis.⁷⁵ The main argument of this approach – the idea that the emergence of a capitalist world-system was the result of an integration of ever larger parts of the world into a European core – has been refined in recent scholarship. Research of the past two decades has recognized that the global economy has by no means been dominated by Europe since the early modern period. On the contrary, we have to acknowledge a remarkable equivalence between European and Asian economies until the late eighteenth century, and to consider the impact of non-European actors, such as Asian and Middle Eastern merchants, on the emergence of modern capitalism.⁷⁶ Nevertheless, an adapted version of world-system analysis could be used as an analytical framework to study the appearance and transformation of particular social groups, such as the bourgeoisie or the working classes, around the world after the eighteenth century. An example of such an approach is Sven Beckert's *Empire of cotton*. Even though Beckert refers to Wallerstein's theory only in passing, his study is an exemplary case of how the examination of class relations can – and must – be linked to the analysis of global capitalism. His work demonstrates how, among others, the global cotton economy shaped agricultural labour, and can be seen as the primary reason for the emergence of industrial capitalism and a metropolitan working class. As a consequence, it can be connected to the transformation of labour regimes across the globe, and is one of the reasons for the development of class society. Furthermore, Beckert's book looks at the emergence of a global bourgeoisie of merchants and bankers, a group that is described as a 'cosmopolitan community' and a 'social class' that 'often had closer connections to people far away than to people in their home cities or immediate hinterlands'.⁷⁷

It is striking that businessmen, from European metropolises to colonial peripheries, shared specific cultural traits that allowed them to establish vast networks. In world trade, European and American merchant houses were regularly on a par with Chinese, Indian, or Arab merchants with whom they liaised when doing business outside the North Atlantic region. As Christof Dejung argues in his contribution to this issue, Western and non-Western businessmen adopted similar business practices and were part of a similar mercantile culture, which is why they can be described as joint members of a

⁷⁵ Wallerstein, *The modern world-system*.

⁷⁶ On the significance of trading houses for economic globalization, see Kenneth Pomeranz and Steven Topik, *The world that trade created: society, culture and the world economy, 1400–the present* (New York, NY, 1999). For an overview of the history of Asian merchants in the colonial period, see Ray, 'Asian capital'; Huei-Ying Kuo, 'Agency amid incorporation: Chinese business networks in Hong Kong and Singapore and the colonial origins of the resurgence of East Asia, 1800–1940', *Review (Fernand Braudel Center)*, 32 (2009), pp. 211–37; Claude Markovits, *The global world of Indian merchants, 1750–1947: traders of Sind from Bukhara to Panama* (Cambridge, 2000); and Tirthankar Roy, 'Trading firms in colonial India', *Business History Review*, 88 (2014), pp. 9–42.

⁷⁷ Beckert, *Empire of cotton*, pp. 234–5.

cosmopolitan bourgeoisie.⁷⁸ Recent research in the field of global labour history shows how the interaction of members of this capitalist class was accompanied by, and in fact relied on, the reorganization of labour across the world after the late eighteenth century. These examples show that social history can – and perhaps has to – be written from a global perspective – or, to put it differently, that global history should be an integral part of social history.

A second approach that may help us to examine the history of social structures from a global perspective is world society theory (also referred to as world polity theory).⁷⁹ This looks at modern societies as communities that are structured by acts of communication. It stipulates that a worldwide sphere of communication emerged with the advent of the modern period, and that processes on the local and national level were influenced – if not determined – by global developments. Critics have pointed out various flaws of this approach. It is unspecific about the impact of inequality – both within local societies and between particular world regions – on the global web of communicative interaction that is world society. Moreover, there is the question of whether or not this worldwide entity really can be considered a ‘society’, given that, on the global level, there is no authority that could govern social processes to a similar extent as state politics did, and still does, within nation-states. Nevertheless, the theory allows us to explore the structuring effects that the intensification of communication had on a global level after the early nineteenth century.

Some studies in global intellectual history, for instance, have explored the transregional movement of ideas and their transformation across borders and cultures.⁸⁰ A social historical perspective of such processes could reveal how, after the late eighteenth century, such intellectual entanglements resulted in the creation of global social networks, whose members used the social capital gained from such interactions to maintain their social status. As Stefanie Gänger argues in her contribution, these networks were often set up by members of the educated middle classes who came from different parts of the world. On the other hand, the rise of educated middle classes as distinct social groups arguably resulted from, or at least was shaped by, their participation in global flows of ideas in the long nineteenth century. Membership of scientific societies and the exchange of ideas in scholarly publications and at international conferences resulted in a global republic of letters in which, at

⁷⁸ Jones, *International business in the nineteenth century*; Dejung, *Commodity trading, globalization, and the colonial world*; and Christof Dejung, ‘Cosmopolitan capitalists and colonial rule: the business structure and corporate culture of the Swiss merchant house Volkart Bros., 1850s–1960s’, *Modern Asian Studies*, 56 (2022), pp. 427–70.

⁷⁹ Niklas Luhmann, ‘Die Weltgesellschaft’, in *Soziologische Aufklärung* (Opladen, 1975), pp. 51–71; Peter Heintz, *Die Weltgesellschaft im Spiegel von Ereignissen* (Diessenhofen, 1982); Rudolf Stichweh, *Die Weltgesellschaft. Soziologische Analysen* (Frankfurt, 2000); Jens Greve and Bettina Heintz, ‘Die “Entdeckung” der Weltgesellschaft: Entstehung und Grenzen der Weltgesellschaftstheorie’, *Zeitschrift für Soziologie*, special issue *Weltgesellschaft* (2005), pp. 89–119; and Georg Krücken and Gili S. Drori, eds., *World society: the writings of John W. Meyer* (Oxford, 2009).

⁸⁰ Samuel Moyn and Andrew Sartori, eds., *Global intellectual history* (New York, NY, 2013).

least in theory, geographical origin was of minor importance.⁸¹ Nonetheless, non-European scholars often found that they could only hope to be noticed in metropolitan centres of knowledge if they had mastered Western languages and academic conventions. Furthermore, only particular aspects of non-European knowledge were integrated into Western scholarship, and often this knowledge was transformed to comply with the disciplinary standards of metropolitan scholars. The global world of ideas was therefore characterized by processes of both inclusion and exclusion.

Another case where communication led to the development of social networks on a global scale was the sphere of politics. The social consciousness of the workers of the labour movement, for instance, resulted not least from the group's claim to internationalism and the notion that the overcoming of capitalism could only succeed as a worldwide endeavour.⁸² Several studies have lately pointed out that cities such as London, Paris, and Mexico City functioned as meeting-points where revolutionaries exchanged ideas and influenced each other.⁸³ Moreover, middle-class intellectuals similarly relied on the worldwide exchange of ideas in order to promote political projects. Notably, the resistance against colonial rule led to the emergence of cosmopolitan thought zones, which allowed intellectuals from different parts of the world to create an anti-imperial repertoire of ideas.⁸⁴ Likewise, research on the emergence of a global civil society in the interwar years can be related to the global history of the middle classes in a much more explicit manner than has been the case to date, as many of the 'literati, campaigners, and reformers' who 'established associations, committees, and leagues, ... founded printing presses, schools, and universities, and established newspapers, magazines, and learned journals, regarding the periodical press as a vehicle of civic life' can indeed be ranked among the educated middle classes.⁸⁵ European and non-European middle classes could have had more shared political interest than has long been assumed; even in the

⁸¹ Important case studies are Stefanie Gänger and Su Lin Lewis, 'Forum: a world of ideas: new pathways in global intellectual history, c. 1880–1930', *Modern Intellectual History*, 10 (2013), pp. 347–51, on scholarly bourgeois cosmopolitanism; and Kris Manjapra, *Age of entanglement: German and Indian intellectuals across empire* (Cambridge, MA, 2014), on more general intellectual cosmopolitanism.

⁸² Good current surveys include Lucassen, *Global labour history*; van der Linden, *Workers of the world*; and Stefan Berger, 'Labour movements in global historical perspective: conceptual Eurocentrism and its problems', in Stefan Berger and Holger Nehring, eds., *The history of social movements in global perspective* (London, 2017), pp. 385–418.

⁸³ Michael Goebel, *Anti-imperial metropolis: interwar Paris and the seeds of Third World nationalism* (New York, NY, 2015); Ann Jennifer Boittin, *Colonial metropolis: the urban grounds of feminism and anti-imperialism in interwar Paris* (Lincoln, NE, 2010); and Fabian Krautwald, Thomas Lindner, and Sakiko Nakao, 'Fighting marginality: the global moment of 1917–1919 and the re-imagining of belonging', *L'Atelier du Centre de recherches historiques*, 18 (2018), <https://doi.org/10.4000/acrh.8086>.

⁸⁴ Elleke Boehmer, *Empire, the national, and the postcolonial, 1890–1920: resistance in interaction* (Oxford, 2002); Gary Wilder, *The French imperial nation-state: negritude and colonial humanism between the two world wars* (Chicago, IL, 2005); Bose and Manjapra, *Cosmopolitan thought zones*; Nico Slate, *Colored cosmopolitanism*; and Manjapra, *Age of entanglement*.

⁸⁵ Andrew Arsan, Su Lin Lewis, and Anne-Isabelle Richard, 'Editorial: the roots of global civil society and the interwar moment', *Journal of Global History*, 7 (2012), pp. 157–65.

colonial period, they were able to collaborate, with the aim of realizing common cultural, economic, and political projects.

Macro-sociological models such as world-system analysis or world-society theory can be used as heuristic models to structure research questions and enrich our debate about definitions of globalization. Whereas world-system analysis focuses on both the establishment and the effects of global capitalism, world-society theory focuses on the growth of worldwide networks of information. These two processes did not involve the same social groups, nor did they inevitably take place simultaneously. These different theories also involve different – material or cultural – notions of class formation. Yet, they do not necessarily contradict each other, as cultural, social, and economic capital may each be converted into one of the others, as Pierre Bourdieu famously observed.⁸⁶

What is more, works that aim to explore global entanglements from a social historical perspective need to acknowledge that not all parts of the world were affected in a similar way by the structural transformations that are addressed by world-system analysis and world-society theory. The field of intellectual history, for instance, needs to take into account the fact that various communities throughout the world had vernacular forms of knowledge that differed from the metropolitan worldview which had become hegemonic in the nineteenth century. Such deviations from metropolitan knowledge can be found in both the Western and the non-Western world.⁸⁷ As mentioned before, such ambiguity calls for a cautious adaptation of any overarching theoretical framework.⁸⁸ Then again, pointing out that such diverse groups did exist in different parts of the world, and that they may have shared similar traits, is certainly one of the main assets of global social history as a distinct approach.

IV

Global history offers a wide range of approaches to the study of the emergence of social groups and milieus in the modern era. By comparison, a global social history can enable us to examine the extent to which particular social groups and milieus shaped, and were shaped by, worldwide interaction. It can be neither a ready-made model for the analysis of globalization nor a vehicle to universalize Western concepts of social theory. Rather, it is a research agenda that aims to include a distinct social history component into global history. As pointed out in this introduction, it can tie in with a plethora of established research fields, such as global intellectual history, the history of colonialism and anticolonialism, and the history of capitalism, to name but a few.

⁸⁶ Pierre Bourdieu, *Distinction: a social critique of the judgement of taste* (Cambridge, MA, 1987).

⁸⁷ Roy Sidney Porter, *Health for sale: quackery in England, 1650–1850* (Manchester, 1989); Sebastian Brändli, *Die Retter der leidenden Menschheit. Sozialgeschichte der Chirurgen und Ärzte auf der Zürcher Landschaft (1700–1850)* (Zürich, 1990); Kapil Raj, *Relocating modern science: circulation and the construction of knowledge in South Asia and Europe, 1650–1900* (Basingstoke, 2007); and Sujit Sivasundaram, 'Sciences and the global: on methods, questions, and theory', *Isis*, 101 (2010), pp. 146–58.

⁸⁸ Raewyn Connell, *Southern theory: the global dynamics of knowledge in social science* (Cambridge, 2007); and Comaroff and Comaroff, *Theory from the south*.

It is time for such a reassessment of social structures in a world historical framework. Global social history has the potential to explore how social stratification and global integration were interlinked in the past, and it may also shed new light on social transformations in our contemporary world. As many observers have noted, the processes of globalization over the past three decades have had a profound effect on social cohesion in many countries. Liberals have had, and still have, to come to terms with the fact that globalization is not seen as a win-win by everyone, but must accept that many people in Western societies – in the American Rust Belt, the deindustrialized north of England, or the rural areas of France or eastern Germany – consider themselves losers of globalization. Dani Rodrik famously suggested the existence of a ‘globalization trilemma’, noting that only two of the three phenomena – democracy, the nation-state, and globalization – can be realized at the same time.⁸⁹ For their part, scholars such as Thomas Piketty and Joel Kotkin have claimed that the deregulation of global capitalism and the establishment of monopolies in the globalized technology sector actually increased the economic disparity between the richest one per cent and the rest of society.⁹⁰ Matters are complicated by the fact that globalization has arguably had quite different consequences in different parts of the world over the past thirty years. While it has resulted in the decline of middle-class aspirations and a crisis of liberalism in many Western countries, in the Global South it has led to a remarkable rise in incomes and the emergence of new middle classes, as Branko Milanović has noted.⁹¹ What unifies all of the social transformations mentioned, though, is the fact that they have all been intrinsically linked to recent processes of globalization.

While there are obviously numerous differences between these developments and processes of globalization in past centuries, overall they might provide an incentive to take a closer look at the intersection of global integration and social stratification in the past. Global social history has the potential to break new ground for historical research. The contributions of this special issue will explore a wide range of examples of how a distinct social historical approach may offer new insights into global history. They will, we hope, be an inspiration for further research in the field.

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⁸⁹ Dani Rodrik, *The globalization paradox: democracy and the future of the world economy* (New York, NY, 2011).

⁹⁰ Piketty, *Capital in the twenty-first century*; and Joel Kotkin, *The coming of neo-feudalism: a warning to the global middle class* (New York, NY, 2020).

⁹¹ Branko Milanović, *The haves and the have-nots: a brief and idiosyncratic history of global inequality* (New York, NY, 2010).

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