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## Uneven and Combined Development & World Systems Analysis: A Combined Approach

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### **Does the Notion of ‘Uneven and Combined Development’ Successfully Improve Upon ‘World Systems Theory’ as an Account of the International?**

What if scholars of world-systems analysis (WSA) and Uneven and Combined Development (U&CD) were a bit like Amundsen’s and Scott’s South Pole expeditions: both aspiring a theory of the ‘international’ with innovative ontologies and critical epistemologies, but the two expeditions race towards such a social theory of the ‘international’ in tacit competition due to mutual ignorance. This essay will attempt to establish a cooperative dialogue by considering Rosenberg’s U&CD a paradigmatic advance by itself and within WSA. After introducing the paradigms, I will discuss ontological and dialectical refinements by UC&D, but also point out its current under-theorisation. I will then consider historical contingency and the universality of capitalism as problem areas in a unified WSA-U&CD paradigm and conclude with remarks on utopian potentials. These discussions prepare the three-part conclusion that (1) WSA indeed benefits from the sub-systemic attention to detail of U&CD, because WSA posits hierarchical systems and because U&CD can account for the system-internal multiplicity that constitutes such ‘life’; that (2) some of the epistemological premises prove problematic for the compatibility of the two paradigms; that (3) while improving upon WSA, U&CD is sound also as ‘standalone’ theory.

### **World Systems Analysis**

WSA as an account of the ‘international’ takes a distinctly different ontological approach than traditional social sciences, which Wallerstein describes as ‘discrete’ disciplines that explain partial social realities (Wallerstein 2004, 1). Against this, WSA offers a comprehensive, systemic account that addresses these difficulties in conjunction with a new unit of analysis and “social temporalities” (ibid., 16). Majorly innovative is the concept of a ‘historical system’ as the unit of analysis that replaces the nation-state as the constituent of the ‘international’. Historical systems exist as minisystems, world-economies and world-systems that each are not necessarily world-wide, but worlds in themselves, i.e. self-contained socio-politico-economic systems that “cut across many political and cultural units” (ibid., 17). This has consequences for the epistemology of WSA, especially as ‘structures of knowledge’ are inherently part of a world-system (ibid., 20).

Further important concepts are an axial division of labour and production that Wallerstein presents as a Marxist-inspired core/semi-periphery/periphery system whose current form, dating back to the 16th century, is the ‘world-economy’ of capitalism (ibid., 22ff). This account of domination situates Wallerstein in the tradition of Frank’s dependency theory and of materialist epistemology (1978): the core consisted of European strong states with an internationally commercially active bourgeoisie that concentrates capital; the periphery is exploited by the core both for its cheaper labour and its raw materials (Griffiths 1999, 384). A semi-periphery serves to stabilise the system against binary opposition politics by being “exploited and exploiter” (Wallerstein 1974, 388). Wallerstein’s core/periphery approach is distinctly economic, and in contrast to WSA scholars such as Chase-Dunn et al., he would not ‘reify’ entire states as loci of core/periphery processes, as either can happen everywhere in the system (2000). Hence WSA can accommodate *horizontal* ‘development’ by transnational capitalist class structures (Halperin 2007).

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On Wallerstein's account, the 'core' seeks to extend profitability of the world-system (2011), which focuses our account of the 'international' on 'hegemonic' states imposing regimes such as periphery reliance on debt that ensures profit of the core at the periphery's detriment. However, both economic and geopolitical leadership is "self-liquidating" because 'hegemony' is based on a *relative* order (Wallerstein 2010, 133). As the developing (semi-)periphery increasingly demands its share of capitalist profits, the very foundations of capitalist exploitation of the global periphery are eroded away, and with it the profitability of capitalism. This increases the contradictions of the current system and contributes to eventual 'systemic crisis'.

The capitalist world-economy is thought of as Konratieff-cyclical: a period of expansion is followed by contraction, whereas measures taken against the latter will result in slightly different, new expansion; this constitutes longitudinal 'secular trends' (Wallerstein 2010, 138). While Wallerstein's avers the *longue durée* of the capitalist world-economy, the notion of 'structural crisis' describes a systemic state far from equilibrium, where there occurs bifurcation between another cycle and a truly new world-system (Wallerstein 2010, 140). A world-system is overcome not through Marxist 'conscious revolution' but by escalating internal contradictions.

## Uneven and Combined Development

This section will discuss Justin Rosenberg's U&CD paradigm (1996) while including 'spatial' accounts of U&CD only tangentially. These are equally important and possibly more elaborate (Harvey 2006; Massey 1995; Smith 2000) in their supporting of a economic-spatial account of domination within capitalism (Harvey 2006, 75–77). Yet, however, this 'spatial' paradigm cannot match Rosenberg's explicit account of the 'international' and the state by merely pointing to a "dialectic of the territorial [i.e. 'political'] and capitalistic logics of power" (ibid., 107). Rosenberg extends Trotsky's seminal historical work of 1930 with a comprehensive account of the 'international' not least by starting from the problematic of IR 'internalism', whereas also:

[N]on-realist approaches in IR, reacting against the essentialising of 'anarchy', grant little or no theoretical significance to the multiplicity of societies itself which composes the international (Rosenberg 2012, 571).

Let us first turn to Trotsky's conception of 'development'. He regards dialectics as 'interactive non-identity' between concepts, whereas 'identity' has a certain 'tolerance' (Rosenberg 2012, 575). Rosenberg calls this the "temporal and spatial partiality of concepts", which makes dialectics "the logic of development" (ibid., 576). 'Development' therefore hinges on unevenness with temporal and spatial dimensions. Extending Trotsky's premises, Rosenberg establishes a social theory of the 'international' through the "*quantitative* multiplicity" of societies (ibid., 581).

How does 'development' unfold, then? Against the "pedantic schematism" of unilinear 'modernisation theory', Trotsky posits a "universal law of unevenness" from which, building on aforesaid numerical multiplicity, derives the "law of combined development" (Trotsky 1980, 5–6). This is the "drawing together of the different stages of the journey" which results in an "amalgam of archaic with more contemporary forms" (ibid.). Central is the (beautifully named) 'whip of external necessity', which, given the multiplicity of societies, puts external social-economic pressure on societies to develop in order to survive: Rosenberg manages to establish developmental 'domains' against the background of international unevenness, but due to 'combined' leaping forward, the social configurations in the 'periphery' interact across time and space, and intra-societally and internationally. Consequently Rosenberg appears as coroner of 'globalisation' theory because of the latter is insensitive towards these dimensions (2005).

The implications of this almost suspiciously lucid 'law' cannot be underestimated – think of critiques of postmodernist culture/identity politics or the 'combined' development of New Regionalism. Most importantly, this is a materialist and sociological account of inequality in the international. This inequality, if conceived of as interactive 'societal multiplicity' as the key referent of the 'international', fits the more domination-oriented but also equally 'relational' account of the international proposed by Wallerstein. In fact, we can understand world-systemic stability much better if we look at the 'life' of a system as a "interactive as well as reproductive" process of social development (Rosenberg 2012, 595).

## Contributions and Contradictions

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The remainder of this essay will explore U&CD as a spelling out of the 'mechanics' of WSA as well as the implications and problems thereof. Before doing so, let us establish that U&CD's theoretical ambition is less 'grand' than WSA, and that Wallerstein's economic conception of the capitalist world-system has been criticised widely (cf. Arrighi 1994 from a more "evolutionary", Brenner 1977 from a more orthodox Marxist perspective), as it would neglect the important intra-systemic actual dynamics that constitute a world-system's 'life'. If we agree that U&CD is less audacious vis-à-vis grand narratives, but also accept WSA's weakness of 'subdued' functionalism (Skocpol 1977), this paradigmatic advance does prove mutually beneficial.

## *Dialectics and the Problematic 'Whip'*

U&CD's dialectical method thrives on pseudo-mechanic social-material 'whip' of the unevenness derived from multiple societies. This interactive and multi-linear 'development' corresponds to Adorno's negative dialectics as the "non-identity of the identical and the non-identical" (Adorno 1983, 161). Unlike Hegelian-teleological "affirmative" dialectics, uneven and combined 'development' is bound to render societies more complex and contradictory beyond 'tolerance' vis-à-vis inter-societal identity. Unfortunately, however, the 'whip of external necessity' is remarkably depoliticised in Rosenberg's U&CD to the extent that it does not really provide a link-in for WSA's core/periphery dynamics of domination and is conceptually blind to potential politico-economic (neo-)imperialist condition of the 'whip'. It seems the 'whip' needs further theorisation both in its linkage with macro-systemic domination as well as for individual 'international' accounts of 'development' to undeniably surpass the neo-realist grappling with unit-level explanation through systemic anarchy. Only then could we, especially being able to understand how the state develops through U&CD, return to the world-system-level to show how imperialism unfolds. For instance, Eurocentrism in 'liberal peace' theory (cf. Sabaratnam 2013) then would be the core's dedicated 'knowledge structure' to extend and prolong periphery exploitation, whereas liberalism glosses over 'unevenness' in core-process dominated polities. However, if the 'whip' is not able to account for the 'contradictions' of the world-system, then Trotskyan dialectics of 'unevenness' cannot rest on Wallerstein's and Adorno's epistemologies that ultimately hinge on "human suffering" as the driver of overcoming such contradictions (Adorno 1983, 17).

## *Ontological Refinement*

From their ontological standpoints, neither WSA nor UC&D reify the state, but by explaining how the social and economic are reconfigured, Rosenberg manages to explain the empirical importance of state governments and distinctly political processes much better than Wallerstein. In lieu of IR realist 'anarchy', a world-system comprised of multiple societies provides a non-essentialist, sociological account of the 'international' and economic. Already Trotsky succeeded in this:

The Russian state, erected on the basis of Russian economic conditions, was being pushed forward by the friendly, and even more by the hostile, pressure of the neighbouring state organisations, which had grown up on a higher economic basis (Trotsky 1930, in Bieler and Morton 2011, 3).

## *Historical Contingency Instead of Systemic Crisis?*

If U&CD has less of a grand-narrative aspiration, it also accounts differently for times of ground-breaking change in 'development' – what Wallerstein calls 'systemic crisis' and 'bifurcation' towards a new world-system. Importantly, Wallerstein devises capitalisms as originating from the 'long 16th century', but he also underscores the Fanonesque chaotic and violent nature of a systemic crisis. Thus, Wallerstein can only foresee incremental 'secular trends' or systemic change in which "political agency prevails over structural determinism" (Wallerstein 2011). If we take the capitalist world-economy as the current world-system, then U&CD will allow for pre-capitalist development to be interactive across time and space, which is more difficult in WSA (Rosenberg 2012, 587). U&CD therefore seems to be more appreciative and more precise about historical contingency when WSA fails to explain. This gives rise to a penultimate issue of the universality of capitalism, as well as a final point about WSA's and U&CD's potential for critique and utopia.

## *The Universality of Capitalism as a Theoretical and Historiographical Challenge*

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Rosenberg might be overzealous in vesting determinacy in 'societal multiplicity' universally: Allinsons and Anievas argue that said determinant character is "only fully activated under the specific socio-historical conditions of generalized commodity production", meaning that the pre-capitalist inter-societal 'international' operated on another determinant and not that of generalized commodity production (Allinson and Anievas 2009, 49). However, not even Marx escaped the difficulty to grapple with the universality of capitalism and its challenges to methodological abstraction to pre-capitalist times (Fracchia 2004). We can however safely affirm U&CD as a reliable account of the 'international' within the capitalist world-economy. Regarding WSA, some of the fiercest criticism aimed at Wallerstein's work pointed to a seemingly inadequate conception of the dynamics of capitalism especially as subsequent to feudalism (Skocpol 1977, 55ff) and the inception of the capitalist world-economy (Teschke 2009).

What are the consequences of this apparent difficulty to employ materialist epistemology outside the (misunderstood) capitalist world-economy? Two pragmatic alternatives to Wallerstein's universalism arise:

(i) A first would be to appreciate the significant contributions of WSA and Rosenberg's UC&D *within* a capitalist world-system with secular trends and changing hegemony at the core.

(ii) A second option would be to refuse the grand theory of WSA but to uphold UC&D as an account for the 'international' at large.

Subsequently, we will have to take a stance on whether UC&D itself is not universal but also only a *modus operandi* of capitalism, as the 'spatial' U&CD theorists suggest (Bieler and Morton 2011; Smith 2006, 182). Rosenberg however insists that U&CD and the capitalist state can be sociologically grounded in post-hunter-and-gatherer times (2010, 183). I return to this issue in the conclusion.

## *U&CD's Inhibitions to Radical Utopianism in WSA*

If we accept WSA universally, we are faced with a novelty social theory in the form of a comprehensive 'grand theory' of the 'international' with a materialist methodology. If theory is always ideology in the form of systematised knowledge (Cox 1981), what are the avenues for praxis? Especially Wallerstein seems to have assumed a role of 'bifurcation vanguard' and seems to attempt to accelerate the transition into a new world-system. Such academic activism is laudable, but his ideological orientation towards a fairer world-system should caution us: perhaps there is an implicit teleology in WSA, partially grounded in a 'subdued' functionalist premise of the world-system's self-reproduction (Skocpol 1977)? It seems, therefore, that Wallerstein's operates on a *tacit* dialectics of systemic crisis that are 'affirmative' towards the realisation of a better world. Such a teleology corresponds to increasingly outspoken utopian aspirations in IR (Brincat 2009) and evokes parallels to Hegel's and Marx's explicit teleology – perhaps a world-system is therefore a *Weltgeist*? While we are incredibly far from Marx's teleology based on his insight that "national differences and antagonisms between peoples are daily more and more vanishing" through capitalism (Marx and Engels 1848, 49), which would lead to a subsequent Revolution, it seems to me that while the *possibility* for such a tacit WSA teleology should galvanise us at an academic level; Wallerstein's personal desired outcome of the current systemic crisis is to be distinguished from WSA at large without such cryptonormativity. Were we to negate the extra-capitalist universality of WSA, then U&CD alone offers much less emancipatory potential at the systemic level and remains more explanatory, especially when if we consider U&C's universality to the capitalist world-economy.

## Conclusion

I believe to have demonstrated aptly how U&CD does indeed improve upon WSA thanks to its sub-systemic attention to detail, but also unearths of WSA. In addition, the disagreements over the universality and beginning of capitalism, historical contingency and different potentials for radical political utopia hinder full compatibility. The concepts mobilised in this essay gain further significance when we think of Slavoj Žižek's dictum "it is easier for us to imagine the end of the world[-system?] than the end of capitalism". Social theory is not exempted: Wallerstein's 'knowledge structures' are system-innate and extra-late-capitalist accounts of the 'international' are unthinkable. Even if ours is the time of

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bifurcation, the voices of 'capitalist realism' (Fisher 2009) might overtake in favour of yet more U&CD-oriented 'development'. Thus if we are tempted to refuse WSA 'grand theory' on the basis of problematic functionalist premises, U&CD supports this as the dialectics of functional reproduction of a system whose functions develop a life of their own, leading to incompatibility of the two paradigms: the 'international' breaks away from the systemic.

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