

2 *Modernity, Historicity and Transdisciplinarity*

In this chapter I attempt to build a transdisciplinary methodology to historicize modernity. The need for transdisciplinarity stems from the idea that disciplinary divisions and categories (such as the political, the economic, the social and the international) are the products of modernity. Therefore, they cannot be used to study modernity's history, which would otherwise impose the structure of modern (capitalist) society onto a differently constituted past. I use a twofold methodological critique to problematize these disciplinary divisions and the attendant tendency to transhistorize the sociospatial parameters of the modern present: the critique of "methodological presentism" and "methodological internalism."

In the first two sections of this chapter, I develop the critique of presentism. Surveying a number of contributions to historical sociology, I argue that extant approaches to the history of modernity suffer (explicitly or otherwise) from transhistorically understood notions of "economy" and "politics." To take economics and politics as separate spheres, each driven by a distinctive rationality, transhistorizes the outcomes of capitalism, hence reading capitalism back in history as an ever-present developmental tendency. I suggest that defining capitalism as "market-dependence" enables a historically specific and historically dynamic conception of capitalism, which, in turn, provides an entry point for a nonpresentist historicization of global modernity. In the third and fourth sections, I turn to International Relations (IR) and historical sociology to develop a critique of methodological internalism. I show that the burgeoning field of international historical sociology (IHS), and in particular the theory of uneven and combined development (UCD), offers unique resources to supplant internalism. By merging the "social" and the "international" at an ontological level, UCD dramatically increases our capacity to capture the interactive, temporal and cumulative constitution of the modern world. In the fifth section, I show how to

combine a noninternalist and nonpresentist conception of history, which, as I will demonstrate in the rest of this book, is vital for capturing the radical multilinearity of modernity in and beyond Europe.

Historicizing Modernity: Beyond Fragmented Methodologies

The history of “modernity” as an aesthetic concept can be traced back to as far as the seventeenth century (Sayer 1990: 9). “Modernity” as a sociological concept, however, has a more recent genealogy. “Modern society” as an object of inquiry has been one of the main preoccupations of social theory since the nineteenth century (Prendergast 2003). Witnessing the sociohistorical rupture brought about by capitalism, modern state formation and industrialization, classical social theorists attempted to uncover the underlying causes of this unprecedented transformation, offering distinct, yet at times converging, sociologies of modern society (Sayer 1990). Yet, although already anticipated in nineteenth-century classical social theory, “modernity” as a sociological concept has been popularized by “modernization theory” of the 1960s (Woodiwiss 1997).

Modernization theory saw modernity as a process of gradual rationalization and differentiation of distinct spheres of social life. In the modernization view, political, economic and cultural spheres, each driven by a distinct set of values, interacted in specific ways in history that ultimately produced the “modern” world of economically industrial, politically liberal and culturally secular entities of the West. Specifying the stages of and preconditions to modernity in the West was then used to identify why these were absent elsewhere in the world (e.g. Lerner 1958; Rostow 1960). It is no wonder that in the modernization lexicon, geospatial differences were understood in terms of such hierarchical binaries as “developed” versus “developing,” which were, in turn, instrumental in fostering the image of modernization as a unilinear and evolutionary developmental path through which all societies must pass. Modernity, in other words, was understood as a more or less singular process for all societies, while its developmental sequence and pattern was abstracted from the presumed historical evolution of an ideal type of modernity, which the United States supposedly epitomize.

Obviously, it has been a long time since modernity departed from the crudest versions of modernization theory (Knöbl 2003). Hardly

anyone today in academia subscribes to the overtly unilinear and evolutionary narratives of social change. Contemporary approaches to modernization no longer understand modernity as a coherent and unilinear path; instead, it is now seen to exist in a multiplicity of forms, moving in competing, inconsistent and often alternative directions complicated by the relations of international hierarchy. In other words, social and temporal diversities are no longer seen as aberrations from an ideal type, but as constitutive and interlinked instances in the movement of global modernity (e.g. Mann 1986; Ashley 1989; Gilroy 1993; Eisenstadt 2000; Gaonkar 2001; Goody 2004; Hobson 2004).

Indeed, there is much to commend in these relatively more recent renditions that attempt to capture the multiplicity and interconnectedness of the modern experience. Yet, despite the diversity of attempts to clarify the social and temporal content of modernity, it remains remarkable that most of the contemporary approaches to modernity (and postmodernity) have reproduced the *fragmented methodology* of modernization theory. Their mode of inquiry still revolves around the assumption that societies function on the basis of a complex interplay of distinct spheres, webs or networks, each operating according to their own logic or rationality (e.g. economic, political, cultural or military). This fragmentation is usually defended on the basis of explanatory parsimony and causal flexibility, which arguably make for an intelligible and nonreductionist history of modernity (e.g. Mann 1986; Giddens 1987; Runciman 1989; Tilly 1990a; Hobson 1997; cf. Lapointe and Dufour 2012). Precisely here, though, we face a fundamental contradiction. Understanding modernity based on the interaction of preconstituted spheres of social life ultimately undermines our understanding of an essential feature of modernity: modernity's historical specificity. Let me explain.

If multiplicity is considered central to modernity, so is its historicity. According to Anthony Giddens, for example, modernity stands for a "particular discontinuity" in human history, a break from our previously existing perceptions of time and space, marked by fundamental changes in the "pace," "scope" and the "nature" of socioeconomic development (Giddens 1990: 4–6). Karl Polanyi tends to concur with this view by emphasizing the radical modernness of "market society." He notes that the rise of market society corresponds more to "the metamorphosis of the caterpillar" than "any alteration that can be

expressed in terms of continuous growth and development” (Polanyi 1957a: 44). Clearly, modern transformation has never been a “quantum jump”; that is, the transition to modernity occurred rapidly but processually, bearing the traces of the previous political, economic and cultural forms (Goody 2004: 11). Michael Mann writes that modernity brought about “structural” changes, “often occurring within single lifetimes,” yet it rarely “swept all away but were molded into older forms” (Mann 1993: 14–17). Thus, the protractedness of modernity aside, the historical specificity of modernity as an epochal shift from past to present has been a persistent reference point for social theory.

What is being exposed here is a discrepancy between what social theory wants to achieve and how it wants to achieve it. For, despite all the historical specificity attributed to modernity and all the different causes said to have impacted its emergence, social theory’s fragmented vision of history diminishes our understanding of modernity’s specificity. Consider Michael Mann’s four-footed methodology and his narrative of the “rise” of the modern state and modern capitalism (Mann 1986). According to Mann, throughout human history, societies have been organized based on four distinct logics of power (ideological, economic, military and political). Such a differentiation of power networks stem from the diversification of basic human needs: economic power networks have been formed to meet the needs for “material subsistence”; political power to “settle disputes without constant recourse to force”; ideological power to provide “meaning and legitimacy”; and military power “to defend whatever they have obtained and pillage others” (Mann 1986: 14). These distinct power networks operate across borders, hence are not internally bounded (Mann 1986: 15). Likewise, a clear-cut separation of power networks hardly exists in the empirical world: “the character of each (network) is likely to be influenced by the character of all” (Mann 1986: 14–15). Yet, given the diversity of human needs, “a broad division of function between ideological, economic, military, and political organizations is ubiquitous,” hence a transhistorical norm (Mann 1986: 18). Networks of power are autonomous and none of them have causal primacy. Yet, they also interact and overlap in a diversity of ways depending on historical and contingent factors, which lends world historical development its nonevolutionary and multilineal character. As such, Mann’s methodology rejects monocausal explanations and breaks with the false image of separate and internally driven societies in

history. These, in turn, allow (at least in principle) a departure from the evolutionary unilinearism characteristic of modernization theory.

Yet, it is questionable the extent to which Mann's methodology based on transhistorically separate spheres of social action can really depart from evolutionary models of social change and capture the historical specificity of modernity. To presume a priori the existence and interaction of institutionally separate power networks risks reading back the consequences of modernity, undermining the process of historicization from the very beginning.

Nowhere is this clearer than in Mann's narrative of the transition to capitalism and the modern state (cf. Teschke 2003: 121). According to Mann, the rise of capitalism and the modern state was rooted in the centuries-long reconfiguration of the ideological, political, military and economic power networks in medieval and early modern Western Europe (Mann 1986: 373). To be more precise, the rise of capitalism was underlined by the absence of a "unitary state" and the distinctiveness of the Roman-Christian legacy in Western Europe. While the fall of the Roman Empire caused the weakening of centralized political power, hence, decreasing demands for taxation, Christianity provided common social norms and a common social identity, thereby unburdening bourgeois classes from the high costs of political regulation. The fragmentation of imperial sovereignty also produced unprecedented geopolitical pressures among competing political units. This forced the holders of political authority to give up most of their redistributive functions and to confirm property rights in exchange for the bourgeois classes' support for war efforts (Mann 1986: 377–8). Once endowed with property rights and absolved from medieval polities' redistributive pressures, people obtained "autonomy and privacy sufficient to keep to themselves the fruits of their own enterprise and thus to calculate likely costs and benefits to themselves of alternative strategies. Thus, with supply, demand, and incentives for innovation well established," the path to Europe's "embryonic transition to capitalism" was cleared (Mann 1986: 409). Henceforth, capitalism and the protomodern state continued to mutually reinforce one another, the former by providing funds for war-making and state-making, and the latter by fulfilling "new pacification requirements" of a rapidly commercializing economy under new geopolitical imperatives (Mann 1986: 500–17). In sum, "(a)s the original dynamism of feudal Europe became more extensive, capitalism and the national state formed a loose but coordinated and concentrated alliance,

which was shortly to intensify and to conquer both heaven and earth” (Mann 1986: 446).

Three important and interrelated problems ensue from Mann’s narrative. First, according to Mann, whenever the holders of political/ideological power secure private property and maintain order without encumbering the economy, people, by definition, adopt a capitalist logic of action; that is, they systematically exploit market opportunities, and progressively increase the degree of product specialization, productivity, technical innovation, commodity production and the size of a dispossessed “free” labor force (Mann 1986: 37). The problem with this approach is that private property, in different yet comparable forms, existed almost throughout history: it can be dated back to ancient societies and was certainly not exclusive to Western Europe (e.g. Goody 2004). There were well-defined property rights in certain parts of the non-Western world such as China, and furthermore, “there are many examples in history where protecting existing property rights actually had negative effects for (capitalist) economic development” (Vries 2012: 83). For example, what caused the transition to capitalism in the English countryside was not the existence of strong property rights per se, but the generalized precariousness of property rights (encoded in custom) that reinforced the arbitrariness of lordly power over the peasantry (Bloch 1961: 277). In France, by contrast, the existing rights on land were relatively more secure during the early modern period, and their codification and further strengthening after the French Revolution kept peasantry in place and agrarian capitalism at bay well into the nineteenth century (Brenner 1985a). Thus, the security of property rights alone is hardly an indicator of the character of socioeconomic relations prevalent in a given context. In other words, property rights by themselves tell us nothing, if anything, about the relational content and societal context of productive activity.¹

Relatedly, prior to the emergence of market societies, property was not a “thing” in itself subjected to the laws of supply and demand. Its sale, status and function were not determined by the market, but customary rules, which were, in turn, vital to the reproduction of the wider military, judicial, administrative and political system (Polanyi

¹ For contrasting views on property rights in history, cf. North 1981: 22–3, chapter 11; Brenner 2006; Acemoglu and Robinson 2012: 429–30; Milonakis and Meramveliotakis 2012.

1957a: 72–3). In this sense, the prior presence or absence of markets and private property “need make no difference” in the transition to a “market society”; that is, “their absence, while indicating a certain isolation and tendency to seclusion, is not associated with any particular development any more than can be inferred from their presence” (Polanyi 1957b: 60–1). Therefore, a mere emphasis on the strengthening of property rights assumes away the wholesale transformation necessary for the emergence of capitalist societies. Viewed together, private property per se is far too general to be interpreted as a necessary precursor of capitalism in history.

Second, equating private property to capitalism on an a priori basis ushers in the transhistoricization and naturalization of capitalism. That is, by uncritically equating private property to capitalism in history, Mann tends to assume an ever-present capitalist potential rooted in private property ownership. Private property is seen as part of a transhistorical economic logic, which, if afforded with the right incentives, unfetters itself from the impediments that stand in its way. As such, the prior existence of capitalism in some embryonic form is presumed in order to explain capitalism’s origins (Wood 1999; Brenner 2006). Therefore, Mann, despite his claim otherwise, delivers an evolutionary narrative based on the gradual “liberation” of a pre-given human proclivity toward capitalism. This signals that Mann’s narrative is susceptible to the charge of what may be called *methodological presentism*. That is, Mann takes as given and extrapolates back in time the present form and logic of the economy – that is, capitalism. The overall consequence is that in Mann’s narrative, the composite transition to modernity is, at least partly, conceived as buttressed and conditioned by a transhistorical process of capitalist rationalization. Modernity becomes part of the teleology underlying the rise of capitalism. Modernity’s historicity ultimately gets lost in the “non-history of capitalism” (Wood 1997a).

Third, Mann’s relapse into presentism is a logical result of his fragmented methodology. By presuming the existence of functionally differentiated networks of power in history, Mann tends to impose the institutional divisions of capitalist modernity onto the precapitalist past. For example, the conception of economy as an autonomous sphere interacting exogenously with other spheres of life is specifically a modern invention (Godelier 1986: 28). In nonmarket societies, “there existed, as a rule, no term to designate the concept of economic”

(Polanyi 1957c: 71); for, “(n)either under tribal, nor feudal, nor mercantile conditions was there . . . a separate economic system in society” (Polanyi 1957a: 74). The economy either “remained nameless” or had “no obvious meaning,” for the economic process and prices were instituted through nonmarket means, such as kinship, marriage, age groups, status, political patronage, and so on (Polanyi 1957c: 70–1; Godelier 1986: 29). The economy began to emerge as a functionally, institutionally, conceptually and motivationally distinct sphere of life only when institutionalized markets compelled and induced economic action driven by a distinctive market rationality. It is the social relations and institutional arrangements of market society that gives the economy a practical significance in social life, an autonomous sphere governed (presumably) by laws of its own (Polanyi 1957c: 68).

Mann’s fragmented methodology, therefore, is susceptible to viewing the past in terms of the present. Mann’s fragmented methodology, for all its parsimony and causal flexibility, ontologizes the consequences of capitalist modernity, hence falling back into evolutionary explanations of world historical development. What is implied here is that an interdisciplinary methodology would not do the job, for interdisciplinarity presupposes the existence of an already fragmented world (Abbott 2001: 135; Lacher 2006: 169). Our ability to register the historicity of modernity hinges on imagining a nonfragmented ontology that would systematically counter methodological presentism. Therefore, there is a strong connection between the historicity of modernity and the transdisciplinarity of our methodology. This is to say that rather than treating the political, the economic, the military and the ideological as self-evident, separate and a priori categories, we need to comprehend their historically changing content and ultimate differentiation from one another.² In this sense, historicization of modernity is not just about bringing history back in, but requires a constant conversation between history and theory, a dialogue that can free our disciplinary categories and assumptions from the presuppositions of contemporary life (cf. Lawson 2007).

Karl Polanyi’s substantivist approach to economic history represents a big step taken in this direction. According to Polanyi, the economy in

² Similar arguments have been made from a variety of disciplinary and theoretical angles, see Nicolaus 1973: 30; Anderson 1974: 402–5; Kosik 1976: 64; McMichael 1990: 385; Abbott 1995: 856–7; Emirbayer 1997: 287.

history cannot be analyzed based on formalistic categories and assumptions derived from market society. Reading back into history, the dynamics and motives underlying market society naturalizes and universalizes self-regulating markets, turning them into self-referential and self-birthing phenomena. This, in turn, narrates a world history in which past economies appear to be mere “miniatures or early specimens of our own” and markets seem to have “come into being unless something was there to prevent it” (Polanyi 1957c: xviii, 1977: 14–15). Immediately lost in this narrative, Polanyi argues, is the insight that the advent of self-regulating markets represented a watershed in human history. “[N]ever before our time were markets more than mere accessories of economic life.” For, social reproduction was never dependent on exchange and production per se, but immediately tied to people’s capacity to mobilize political, juridical, custom-based and territorial privileges and sanctions. In other words, kinship, custom, political/jurisdictional and territorial arrangements constituted economic relations themselves (Polanyi 1957c: 70–1). Therefore, even “where markets were most highly developed, as under the mercantile system,” the economic system, as a rule, “was absorbed in the social system” and showed “no tendency to expand at the expense of the rest.” In this sense, the self-regulating and self-expanding markets “were unknown in history; indeed the emergence of the idea of self-regulation was a complete reversal” of previously existing patterns of social reproduction (Polanyi 1957a: 71).

What Polanyi implies is that the development of market societies was not a logical extension of preexistent social and economic patterns, but rather the consequence of a fundamental rupture in millennia-old patterns of social reproduction. In order for self-regulating markets to self-regulate, the age-old communal systems of social and moral regulation had to be eradicated, a process that systematically subordinated the “natural and human substance of society,” that is, land and labor, to market relations for the first time in history (Polanyi 1957a: 42). In other words, the market economy arose only when “land and food were mobilized, and labor was turned into a commodity.” Only with the rise of institutionalized markets that systematically commodified land and labor did the economy begin to constitute (however fictitiously) a separate economic sphere that functioned according to its own rules. Therefore, it is only these new social relations and institutional arrangements that make relevant the “view of the economy as

the locus of allocating, saving up, marketing surpluses” and “compel (ling) economizing actions.” Furthermore, Polanyi promptly adds, all this is “nowhere created by mere random acts of exchange” but is an “institutional setup” (Polanyi 1957c: 240, 250–1, 255).

Unlike Mann, therefore, Polanyi tends to explain the emergence of capitalism in a way that does not already contain capitalism’s logic or dynamic as part of historical explanation. The transition to capitalism had nothing to do with the gradual unfettering of a dormant transhistorical economic logic in history. Instead, an entirely unprecedented institutional mechanism was imposed on human beings, which led to the rise of the market economy and concomitantly to the appearance of the economy as a separate sphere of human action. At stake in Polanyi’s analysis, therefore, is a departure from a presentist interpretation to a nonpresentist one – that is, from a transhistorically cumulating capitalism toward a conception of capitalism as a qualitative break in human history. Relatedly, Polanyi’s substantivist conception of the economy works as an effective antidote to transhistoricism, as well as showing us how to “unthink” the fragmentation of our methodologies. By emphasizing the inseparability of the economy from other spheres of life in history, Polanyi insists on the unity of life experience, helping us imagine a nonfragmented methodology on which a transdisciplinary social science can be built and operationalized. By countering the false identification of the economy with its market form, Polanyi opens up a theoretical space, in which we can move beyond methodological divisions and begin to envisage a nonpresentist historicization of modernity.

All that said, however, Polanyi’s departure from presentism ultimately remains mired in his somewhat economically determinist narrative of the emergence of market society. He writes that “[t]he idea of a self-regulating market system was bound to take shape once elaborate machines and plants were used for production.” For “they (machines) can be worked without a loss only if . . . all factors (of production) are on sale, that is, they must be available in the needed quantities to anybody who is prepared to pay for them” (Polanyi 1957a: 42–3). Eventually, then, Polanyi views the emergence of market society somewhat as a function of cost-calculation and technological changes associated with the Industrial Revolution. Indeed, this is rather an abrupt lapse into economic-technological functionalism. While Polanyi acknowledged that capitalism cannot be treated as an inherent

potentiality in human history, he failed to properly historicize the making of market society. An implicitly presentist narrative of the transition to capitalism undermined his otherwise forceful critique of *Homo economicus*.

From Marx to Marxism: Unifying the “Political” and the “Economic”

The contradictions and ambiguities that mark Polanyi’s oeuvre perhaps find their strongest echo in Karl Marx’s critique and method of the historicization of capitalism. On the one hand, it seems incontestable that Marx is a presentist. Although he never embarked on a systematic historical inquiry into the origins of capitalism, Marx tends to make economic arguments in several early texts. He emphasizes the primacy of economic factors and actors in history as if the economic was already a separate sphere, the prime example of which is the infamous “base/superstructure” metaphor derived from the 1859 “Preface.”³ Likewise, in the *German Ideology* and the *Communist Manifesto*, he explains the emergence of modern social forms through the “rationalization of division of labor,” crisis of the “relations of production” or the rise of “bourgeois classes” (Marx 1975: 8–9, 1976: 19) Perhaps this economic tendency is not too surprising a consequence considering especially that the early Marx seems to have extensively relied on and appropriated the taxonomies of nineteenth-century liberal historiography, including a “stagist” history driven by the unilinear and transhistorical conceptions of “progress” (Godelier 1986: 99; Comninel 1987: 86, 2019: chapter 5).

In this sense, it is little wonder that several scholars have taken Marx and Marxism to task for their “irremediable” evolutionism/determinism. According to Anthony Giddens, for example, there is a strong tendency in Marx’s theory of history to give priority to “production over other elements of social life,” which ultimately results in an “evolutionary scheme” of history marked by transhistorical patterns

³ From the *Preface to A Contribution to the Critique of Political Economy*: “The relations of production constitute the economic structure of society – the real foundation, on which rise legal and political superstructures and to which correspond definite forms of social consciousness. The mode of production in material life determines the general character of the social, political and spiritual processes of life” (Marx 1996a: 159–60).

of conflict and development (Giddens 1985: 88). Likewise, E. H. Carr argues that Marx wrote “as if economics and politics were separate domains, one (the latter) subordinate to the other (former), therefore unable to capture that ‘economic forces are in fact political forces’ in history” (Carr 1981: 116–17). In a similar fashion, Charles Tilly (1984: 79) contends that it is uncertain in Marxist analyses if the state and the organization of coercion in general have a logic of their own, or if they ultimately reduce to the logic of production. The conventional verdict, then, is that Marxism in all of its guises falls into some form of economic reductionism, hence presentism: “a non-reductionist Marxism is a non-sequitur” (Hobson 1998: 358; 2011).

Whether or not one agrees with these critiques, however, in Marx’s mature accounts, the influence of presentist categories and the resultant economic determinism is countered by a consistent emphasis on the historical specificity of class societies and of capitalist society in particular. In the *Grundrisse*, for example, he accuses liberal political economy of presenting the economy “as encased in eternal natural laws independent of history,” which were “then quietly smuggled in as the inviolable laws on which society in the abstract is founded” (Marx 1993: 87). Likewise, in volume 1 of *Capital*, he writes that the categories of liberal economy are not eternal but “forms of thought expressing . . . the conditions and relations of a definite, historically determined mode of production,” whose validity “vanishes . . . so soon as we come to other forms of production” in history (Marx 1996b: 65).

In a similar vein to Polanyi, then, the late Marx argues against the eternalization and naturalization of capitalist social relations and economic categories. By implication, he too holds a strongly discontinuist view of the transition to capitalism. He stresses the submergence of economic transactions in extraeconomic processes (and vice versa), hence the inseparability of the economic and the noneconomic in precapitalist history (Marx 1997: 776–7). Relatedly, he notes that “[t]he original formation of capital does not happen, as it is sometimes imagined, with capital heaping up necessities of life and instruments of labour and raw materials” (Marx 1993: 507). Put another way, the existence of wealth in the form “merchant capital” and “usurer capital” is “insufficient to explain” and indeed in some circumstances “stands in inverse” relation to the transition to capitalism (Marx 1997: 730–2, 444–50). Commerce and money can have a “solvent

effect on traditional economic structures” but, by themselves, do not guarantee and indeed may hinder the development of capitalist social relations. Therefore, the transition to capitalism was not facilitated by economic processes per se; it did not have anything to do with money or market exchange, but it required a radical political intervention and social transformation. What was central to the transition to capitalism was “the expropriation of the great mass of the people from the soil, from the means of subsistence, and from the means of labour; this fearful and painful expropriation of the mass of the people forms the prelude to the history of capital” (Marx 1996b: 749). Only after such a process of “primitive accumulation” began, could the basic categories and assumptions of liberal political economy hold – that is, land and labor could be considered commodities and the assumption of a cost-saving, productivity-maximizing and labor-saving individual can be introduced into historical explanation as a general typology.

In short, Marx, in his later works, attempts to unfreeze his historical categories. He no longer views capitalism as something natural, slowly germinating in the interstices of precapitalist societies, ready to burst forth as the division of labor or the forces of production advance, but as an unnatural discontinuity founded upon an unprecedented reorganization of humans’ relation to land and to one another (Marx 1996b: part 8). And it is indeed this recognition of the epochal difference of capitalism that allowed him in the *Ethnographic Notebooks* to explicitly deny that he had created a unilinear trajectory of historical development and the stagist view that non-Western societies such as Russia or India had to first follow a natural and preordained path to capitalism before building a socialist society (Anderson 2010: 228).

The overall point is that the late Marx’s concepts are as substantivist as those of Polanyi; their meanings are not fixed but change in history; hence, they have a built-in potential to preempt presentism. Despite his contradictory legacy, therefore, Marx’s critique exposes the historicity of economic relations, and by doing so, it has the potential to lay the basis of a transdisciplinary approach to historicizing modernity. Yet, to realize this potential, historical materialism has to first find a way to fully recover from the complications caused by the economistic models of historical development, and then to translate Marx’s nonpresentist insights into a systematic narrative of the origins and development of the modern world. According to Ellen Meiksins Wood, for example, historical materialism would be better off completely dispensing with

the base-superstructure model (instead of trying to modify and reproduce it in different guises).⁴ For a more accurate historical materialist understanding of modernity,

our current conceptions of the “political” and the “economic” must be subjected to critical scrutiny in order not to take for granted the delineation and separation of these categories specific to capitalism. This conceptual separation, while it reflects a reality specific to capitalism, not only fails to comprehend the very different realities of pre- or non-capitalist societies but also disguises the new forms of power and domination created by capitalism. (Wood 1995: 11)

Wood’s remarks echo E. P. Thompson’s suggestion that the alleged “superstructural” relations in fact constitute the economic “base” itself (Thompson 1995: 130). Law, moral codes, political institutions and forms of subjectivity are not “reflections” of, but constitutive of and central to the social reproduction of life and its “material” conditions (Thompson 1991a: 2). In this sense, a “mode of production” is not an economic structure that “social and cultural phenomena ... trail after ... at some remote remove” (Thompson 1965: 84). Instead, as Derek Sayer puts it, it is a particular “mode of life” that encompasses “the totality of social relations, whatever these may be, which make particular forms of production, and thus of property, possible” (Sayer 1987: 77). Phrased differently, production or the “base” cannot be “just ‘economic’ but also entails, and is embodied in, juridical-political and ideological forms and relations that cannot be relegated to a spatially separate superstructure” (Wood 1995: 61). In short, historical materialism, thus construed, provides a holistic ontology of the

⁴ Many attempts have already been made to modify the base-superstructure model in order to save historical materialism from the charge of economic determinism. The widespread appeal of Althusserian Marxism, for example, rested precisely on its allowing of political and ideological superstructures to be “dominant” in a given “conjuncture,” and the postponement of the “determination by the economic” to the “last instance.” However, this shift from “crude” to “remote economism” is hardly a cure for the problem itself (Lacher 2006: 30). Furthermore, when this inexorable economic straitjacket becomes too rigid and attempts are made to relax it by injecting a greater degree of “relative autonomy” to superstructures, this then risks the “randomization” of history and social agency (Wood 1986: 31–5): “the base becomes a mere thing which can be safely ignored, while the relatively autonomous superstructures become too complex to analyze systematically and determination becomes ‘overdetermination’ verging on indeterminacy” (Holstun 2000: 91).

economic and the political, which then can be used to learn how to think in “real historical time,” how to think in noncapitalist terms and how to historicize the transition to modernity without presuming a transhistorical economic rationality.

Yet, our ability to operationalize this theoretical potential rests on formulating a nonpresentist definition and a narrative of the origins and expansion of capitalism (which Polanyi failed to deliver). In this respect, we may allow Robert Brenner and Ellen Meiksins Wood to carry some water for us. Both Brenner and Wood, the founders of a distinct brand of historical materialism known as Political Marxism (PM), begin their analyses by emphasizing the unity of the political and the economic in noncapitalist history. Just like Polanyi and the late Marx, both Wood and Brenner argue that production, appropriation and distribution of surplus product and surplus labor – the economic – was immediately tied to the political in precapitalist history. The producer was not separated from the means of production; thus, the extraction of the surplus product had to be obtained by noneconomic means. Having a share of, investing in and being recognized by political authority was the only way to secure access to land and peasant surpluses. Subsistence, exchange and accumulation immediately and necessarily took political and geopolitical forms (Brenner 1985a; also see Teschke 2003). In other words, prior to capitalism, there was no spatial and temporal differentiation between political and economic powers, that is, the moment of appropriation and the moment of rule were fused. Political authority and political privileges were the most immediate source of surplus extraction, commercial power and income. Given the necessary fusion of economic and political powers, the political elite was not qualitatively different from the economic elite. They were species of the same genus.

How does PM explain the differentiation of the political and the economic under capitalism? Wood views the development of capitalism “as the outcome of a long process in which certain political powers were gradually transformed into economic powers and transferred to a separate sphere” (Wood 1995: 40). That is to say, capitalism has created the fiction of self-regulating markets by systematically cutting off “essentially political issues” (e.g. the control of labor, land, production and property) from the political arena and displaces them to a separate economic sphere (Wood 1995: 20). At the heart of the economic, therefore, rested a political, legal and violent process that led to

the historically unprecedented characterization of land and labor as commodities. From this perspective, capitalism cannot be seen as an economic phenomenon at all, but is based on the reorganization of political relations and the nature of social power in hitherto unexperienced ways that the economic in the end becomes conceivable as a separate sphere; and the state abstracted from the immediate relations of economic appropriation acquires a political form.

Obviously, this separation is strictly formal; the underlying unity of the political and the economic holds in capitalist societies too. That is, it is true that under capitalism, the relations of exploitation do not *necessarily* rest on extraeconomic coercion. Given the commodified nature of land and labor, the mere threat of unemployment and dispossession may be sufficient to ensure the continuity of capitalist appropriation and accumulation. Yet, this by no means excludes the *possibility* of the use of noneconomic means of coercion. Legally coerced wage labor, extremely authoritarian forms of social control and imperialist interventions are very commonly used to ensure the (geo)political basis of capitalist dominance and discipline. Equally important, in a sense, economic and political powers are even more strongly integrated in capitalism than they ever were previously. For the decisions concerning the allocation of labor and resources have never been more thoroughly subjected to the dictates of profitability and the production process has never been more closely regulated and managed (Wood 1981: 92). Likewise, the state is *sine qua non* for all market economies given its market-correcting, market-enabling and market-saving “interventions” into the economic sphere. Yet, even the language of “intervention” is suggestive of capitalism’s specificity: only in capitalism do these spheres gain a self-referential character and the analytical division between the political and the economic parallels their institutional differentiation.

Against this methodological background PM attempts to formulate a nonpresentist definition of capitalism. Political Marxism does not see the mere existence of profit-seeking, commercial classes, wage labor or private property as necessary precursors of capitalism in history. All these phenomena, in different yet comparable forms, can be dated back to ancient societies; therefore, their unqualified equation with capitalism risks capitalism’s transhistoricization and naturalization. By uncritically associating commerce, private property and wage labor with the existence of capitalism in history, we end up seeing capitalism

present at all times and at all places (in embryo form), hence treating capitalism as if it were something intrinsic to human nature. Undoubtedly, this is not to deny that capitalism increases the volume of production, commerce and the size of a commodifiable workforce; yet, taking these as “necessary” indicators of the existence of capitalism in history simply collapses capitalism’s consequences into its causes (Brenner 1977: 52; Wood 1999: 176–7).

According to PM, therefore, the transition to capitalism cannot be understood as the quantitative extension of any economic phenomena. Capitalism is not just more of the same thing. It is not just more trade, more markets, more private property or more wage labor, but the transitions to capitalism required a qualitative shift in the way societal relations were organized, such that the customary conditions of social reproduction were systematically undercut, and the market was made the ultimate basis for holding and expanding the means of life. In other words, transitions to capitalism did not follow a universal pattern, yet all transitions, in principle, required a strategic political intervention and an institutional setup to systematically eliminate nonmarket survival strategies so that the market could turn into the main institution responsible for social reproduction. In a setting that is becoming capitalist, therefore, land and labor are mobilized as commodities, and the market is no longer a space of “opportunity,” where goods and services are occasionally sold, but turns into an “imperative” for social reproduction.

As such, capitalism presupposes the development of market-dependent societies, in which laborers and propertied classes are systematically forced and enabled to transform the conditions of production and subsistence according to market imperatives (Wood 2002). Put another way, capitalism as market-dependence signals the rise of a sociolegal order that is subsumed to the operation of market imperatives or the “law of value,” that is, a form of society that systematically enables and compels producers and employers to increase the “ratio of unpaid labor to paid” and reduce the “socially necessary labor time” involved in appropriating “surplus value” (Post 2013). Such a conceptualization diverts our attention from transhistorical phenomena usually considered as preconditions to capitalism toward the ruptural processes of building market-dependent societies.

How did such a rupture occur in history? A fuller narrative of the transitions (and nontransitions) in Europe will be provided in Chapter 3; here it suffices to say that capitalism’s first appearance in

world history was an unintended result of social and geopolitical struggles in early modern England. A combination of factors, such as historically distinct forms of lordly solidarity, traditions of peasant resistance and lack of geopolitical opportunities, set off a process of transition in postfeudal England, during which the immediate unity of political and economic powers began to dissolve. In particular, following the social and demographic convulsions brought about by the Black Death (1340s), lords began to lose their extraeconomic powers in the face of heightened peasant resistance/flight. As a result, they had to increasingly rely on the king's legal authority to maintain their incomes and rule over the peasantry. In this context, peasants were able to change their conditions of servitude, yet they were not able to gain property rights to the lands that they customarily occupied. Taken together, from the 1450s, a new sociolegal order began to emerge in England, in which lords owned the land, yet they were unable to tap peasant surpluses through extraeconomic measures. Combined with their geopolitical losses on the continent, lords had no option but to increasingly resort to market-based measures to appropriate peasant surpluses and maintain themselves as lords. As such, they initiated a process that was to transform the millennia-old rules of accessing land. Lords, sometimes in cooperation and sometimes in conflict with the monarchy, began to systematically change the manorial custom, subjecting peasant tenants to competition for market-determined leases (Brenner 1985a: 49). This signalled a departure from the subsistence logic of agriculture toward a system-wide political-economic transformation, during which both the direct producers and the appropriators of their surplus became market-dependent. They were progressively compelled and enabled to specialize, accumulate, invest, innovate and maximize productivity and output in order to survive the market imperatives and to pay rents at market rates. Capitalism was thus born.⁵

⁵ Compare this narrative with Wallerstein's historical sociology of the emergence of the "capitalist world economy." According to Wallerstein, lords and merchants, driven by commercial opportunities and profits, transformed the "mode of labor control" into wage labor in the "core" of the capitalist world economy, whereas the relative lack of commercial opportunities compelled the ruling classes in the "periphery" to use more coercive forms of labor control; peasants became serfs and were coerced into cash crop production in the "periphery" (Wallerstein 1974: 87–116). The transformation of property relations is therefore perceived by Wallerstein as a function of different levels of

In England, therefore, social actors “acted to reproduce themselves *as they were*,” and while doing so, this led to a contingent or unintended process of creating a market-dependent society (Wood 2001a: 58).⁶ Elsewhere in Western Europe, no similarly contingent development of capitalism occurred during the early modern era. In France, for example, lords did not lose their extraeconomic powers of surplus appropriation, nor did peasants lose hereditary possession of their lands. The struggles within and among contending classes and polities considerably transformed the logic of appropriation and rule in early modern France, yet did not result in a qualitative break. No market-dependent society emerged from the interstices of the old. In its stead, capitalism began to spread to France and the states of continental Europe only from the nineteenth century onward and as a protracted process compelled (directly or indirectly) by the geopolitical pressures engendered by the success of Britain’s capitalist economy (Wood 1991: 159–60).

By emphasizing the specificity, contingent emergence and geopolitically driven expansion of capitalism in history, PM breaks with the tendency to transhistoricize and naturalize capitalism. As such, PM provides a powerful check against methodological presentism.⁷ Relatedly, as I will show in the next chapters, by countering the transhistoricization of capitalism, PM opens up new avenues for

profitability and the commerce-based division of labor. What is overlooked by Wallerstein is that profit-seeking, markets and commercial classes are not synonymous with capitalism. Depending on the preexisting context of social and international relations, profits accrued from commercial activity may empower a variety of actors and initiate a multiplicity of processes, hence not necessarily leading to capitalism (Brenner 1977; also see Skocpol 1977).

⁶ Here, “contingency” in no way means mere accident or luck of a purely external and nonsociological nature (for a critique of approaches that explain the rise of Europe through a series of fortunate accidents, see Bryant 2006). Rather, it is a social phenomenon that is related to the open-ended character of class and geopolitical struggles and can be explained by analyzing the variations in the degree of self-organization of the ruling and producing classes (Brenner 1985a: 36).

⁷ Several scholars have argued that even if PM breaks with the tendency to transhistoricize and naturalize capitalism, its understanding of capitalism as market-dependence is too “narrow,” derived only from the experience of northwestern Europe (inter alia Anievas and Nişancıoğlu 2015: 22–9). A thorough discussion on PM and its (alleged) Eurocentrism falls beyond the scope of the present book. For a defense of PM, see Duzgun (2018a, 2020).

reconsidering the radical multilinearity of the world historical development.⁸ All that said, however, it is still not clear the extent to which Wood and Brenner, the first generation of PM, could provide a transdisciplinary methodology adequate for the historicization of modernity. The problem is that although the critique of presentism does a good job in taking us beyond the timeless notions of the economic and the political, it fails in one important aspect. The critique of presentism with an exclusive focus on politics and economics does not take us far in explaining the constitution of the spatial parameters of the modern world. For, the modern world is characterized by the spatial differentiation of an international sphere from the social realm, as well as by the separation of politics and economics. Therefore, the “international” and the “social,” just as the “economic” and the “political,” are not to be taken for granted, but historicized for a more complete understanding of the origins and development of global modernity. In short, if the historicization of modernity is connected to our ability to problematize the institutional and analytical divisions created by modernity itself, the second step in this direction involves overcoming the analytical bifurcation between the social and the international. The critique of methodological presentism needs to be combined with the critique of methodological internalism. This signals the need to further deepen our ontology in ways to capture the coconstitution of social and international processes in history. A discussion on IHS is in order.

International Historical Sociology: Unifying the “Social” and the “International”

“In a basic sense,” writes Theda Skocpol, notwithstanding the structuralist-functionalist interregnum of the postwar period, “sociology has always been a historically grounded and oriented enterprise” (Skocpol 1984: 1). Necessarily so, for, as Charles Tilly remarks, “to the degree that social processes are path-dependent – to the extent that

⁸ For more recent PM-influenced historical sociology scholarship (see Teschke 2003; Lacher 2006; Dufour 2007; Gerstenberger 2007; Patriquin 2007; Hoffmann 2008; Kennedy 2008; Post 2011; Knafo 2013; Dimmock 2014; Bauerly 2016; Evans 2016; Isett and Miller 2016; Zacaes 2018; Lafrance 2019b; Post and Lafrance 2019; Pal 2020; Salgado 2020a).

prior sequence of events constraints what happens in time – historical knowledge of sequences becomes essential” (Tilly 1991: 86). Sociology, then, is an inevitably historical venture. And, as Philip Abrams notes, the opposite applies too. Sociology is bound to be “concerned with (historical) eventuation, because that is how (social) structuring happens . . . , (just as) history must be theoretical, because that is how structuring is apprehended.” In this sense, historical sociology is not to be understood as some “interdisciplinary flag-waving and territorial-wrangling between historians and sociologists,” but it is the core of both disciplines. Therefore, instead of trying to “give historical work more ‘social context’ or . . . sociological work more ‘historical background,’ ‘there might be much more to be gained by reconstituting history and sociology as historical sociology,’” a transdisciplinary enterprise (Abrams 1982: xi, 2, ix; also see Bryant 2005: 71).

A transdisciplinary historical sociology seems essential to the comprehension of the social. Nevertheless, the social offered by social theory has long been criticized for lacking an international dimension (Rosenberg 2016a: 19–20). As far back as 1958, Ralf Dahrendorf contended that contemporary sociology remained wedded to a utopian image of society as a self-sufficient and internally consistent unit, hence analytically “suspended in time and space, shut off from the outside world” (Dahrendorf 1958: 117). In 1973, Antony Giddens noted that “[t]he primary unit of sociological analysis, the sociologist’s ‘society,’ has never been the isolated, the ‘internally developing’ system which has normally been implied in social theory.” In this sense, “[o]ne of the most important weaknesses of sociological conceptions of development since Marx has been the persistent tendency to think of development as the ‘unfolding’ of endogenous influences within a given society.” This is a fundamentally misleading assumption, according to Giddens, for, external factors are not just “an ‘environment’ to which the society has to adapt,” instead the outside is always combined with the internal, “determining the transformations to which a society is subject” from the very outset (Giddens 1973: 265). Two decades later, Friedrich Tenbruck echoed Giddens, expressing dissatisfaction with sociology’s internalist bias. Tenbruck argued that despite several attempts to recognize the international dimension of social transformation, sociology has remained rooted in “internalist histories,” which blur “the fact that all societies are, in their internal

constitution, already externally conditioned and mostly tied in with other societies” (Tenbruck 1994: 91). Therefore, what is needed is a

revision of sociological concepts and theories which must no longer start with the concept of an independent “society” but from a *plurality of societies* with their intersocietal relations and conditioning and other boundary-transcending processes of societalization, so that the existing nature and degree of interdependencies enter the conceptual apparatus and problem definitions. (Tenbruck 1994: 81, my emphasis)

In short, for all its diversity, social theory, both classical and contemporary, seems to be marked by what may be called *methodological internalism*.⁹ Internalism tends to take the assumption of self-contained societies as an ontological given, hence reading back in history the sociospatial consequences of modernity, that is, *relative* territorial exclusivity and societal fixity. Indeed, against this internalist bias, since the 1970s, several historical sociologists have offered intersocietal or international perspectives on world history (Anievas and Matin 2016: 2–3). The voluminous works of Perry Anderson (1974, 1978, 1992), Michael Mann (1986, 1993, 2012), Immanuel Wallerstein (1974, 1980, 1989, 2011), Theda Skocpol (1979, 1994) and Charles Tilly (1984, 1990a) have all had an explicitly internationalist orientation. For example, Perry Anderson, in his work on modern revolutions, notes that revolutions “were historically interrelated, and the sequence of their connexions enters into the definition of their differences. Their order was constitutive of their structure” (Anderson 1992: 116). Anderson, thus, emphasizes the cumulative impact of international relations in constituting sociological differences (and vice versa). By doing so, his analysis seeks to challenge what he calls “chronological monism,” that is, a “uniform temporal medium” in which “events or institutions appear to bathe in a more or less continuous and homogeneous temporality” (Anderson 1974a: 9–10). Anderson’s effort to theorize “real historical time” mirrors Tilly’s warning that the treatment of countries as “distinct societies, each having its more or less autonomous culture, government, economy, and solidarity” is bound to create an image of development “in natural-history form: stages, sequences, transitions and growth”

⁹ The problem of methodological internalism has taken different names across the social sciences, such as “methodological nationalism” in sociology (Smith 1979) and the “territorial trap” in geography (Agnew 1994).

(Tilly 1984: 11, 98). All in all, then, for the past four decades, historical sociology has taken an international turn, which enabled not only a departure from the fiction of separate societies in history, but also from the assumption of a more-or-less unilinear sequence of “progress” toward modernity.

That said, while recognizing the relevance of the international, historical sociology has yet to sufficiently incorporate the question of temporality and internationality to the study of the social.¹⁰ For example, Skocpol’s “intersocietal approach” and Wallerstein’s “world-system” analysis have both probed the question of how to explain local/national particularities in a deeply interconnected international order. Yet, both frameworks have proved to be problematic. On the one hand, Skocpol strongly endorses the international dimension of social change, yet in her work the international still figures as an “extra-social” phenomenon (Matin 2013a: 7–8). In Skocpol’s model, international relations impact revolutionary transformation within states, yet it is not clear if the opposite also applies. The social seems to carry no weight in defining international dynamics. As a result, nowhere in Skocpol’s analysis does the cumulative impact of international relations enter her explanation of what societies are and how they transform (Teschke 2003: 123; Rosenberg 2006: 310; 2008: 85; Shilliam 2009: 31; Matin 2013a: 8; Go and Lawson 2017: 26). On the other hand, in Wallerstein’s world-system theory, analytical units are not discrete; they are all interrelated (albeit unevenly) within a web of global division of labor, which dictates its own internal imperatives to its parts. Sociospatial differences (modes of labor control, type of state, etc.) across these units are understood in terms of the reproductive requirements of the world economy. A region’s role in the international division of labor, which is determined by the timing of its incorporation into the world economy, defines its historical specificities (with little attention paid to how historical specificities

¹⁰ Clearly, the concept of society or the social should not be taken for granted; for both concepts refer to a historically specific way of structuring of social relations (and in this sense, both concepts are sociologically and ideologically loaded; Owens 2015). Yet, society or the social can still be thought of in a way that overturns the methodologically internalist/nationalist connotations of these concepts. As will become clear in the next pages, UCD provides precisely that: it uses the concept of society (and development) only to undermine the singular ontologies of society and unilinear conceptions of development (Rosenberg 2016b).

themselves could impact a region's "mode of incorporation"). Wallerstein's "international," therefore, tends to operate in a way that reduces sociospatial specificities to the functional requirements of a presumed whole/totality (cf. McMichael 1990). Sociospatial specificities enter Wallerstein's historical narrative only as spatially differentiated versions of an all-encompassing conception of capitalism, such as "peripheral capitalism," "semi-peripheral capitalism" and so on. As such, Wallerstein tends to overlook the possibility of alternative developmental paths, obscuring the multilinearity of world historical development.

What transpires from this discussion is that neither an extrasocial nor an overarching conception of the international provides a viable alternative to the internalist and unilinear accounts of world historical development. Neither Skocpol nor Wallerstein takes us far in understanding the international as part of an evolving historical continuum. Thus, neither scholar can assist us in fully recovering the temporal, sequential and intersocietal dimensions of global modernity. This failure hints that the critique of internalism has to go beyond the empirical acknowledgment of the international. Making the international intelligible in historical and sociological terms requires a deeper ontology that involves the international not just as an ad hoc addition to, but as an organic and constitutive part of social reality from the very outset (Rosenberg 2006). In other words, providing an alternative to internalism (and unilinearism) rests on our ability to formulate a transdisciplinary methodology that simultaneously plumbs the social in the international, and the international in the social. In addition to battering the demarcations between the political and the economic, therefore, we need to find a way to conceptually interiorize the international into the social and vice versa.

As shown earlier, historical sociology by itself has proved unfit to sufficiently fulfill this theoretical requisite. How about IR? International Relations, given its disciplinary focus on the international, seems well-positioned to shed light on this methodological problem. Yet, even a perfunctory glance immediately reveals that for most IR scholarship, the international is an unproblematic category, an independent variable devoid of sociotemporal content, an unmalleable space governed by a timeless logic of geopolitical competition. Of course, this does not mean that mainstream IR does not do history. Yet, history plays into mainstream IR only in an

instrumentalist way: “history is used not as a means to rethink the present, but as a quarry to be mined only to confirm the theories of the present” (Hobson 2002: 5). For example, Thucydides’ discussion of the Peloponnesian War or the shape of medieval geopolitics are often invoked in order to exemplify and corroborate the alleged timelessness of such IR concepts like anarchy and balance of power (Waltz 1979: 118; Keohane 1986: 7–8). Rather ironically, then, history in IR is used in a way that undermines the historicity of IR’s own subject matter – the international. International Relations uses history to support its transhistorical claims about the nature of intersocietal relations, and as such it turns history into a mere “background narrative to be coded within pre-existing theoretical categories” (Lawson 2012: 205).

Of course, several alternative accounts have been already offered to (re)claim the historicity of international or intersocietal relations. In particular, the last three decades have witnessed numerous attempts to advance historical sociology as a critical approach to IR (HSIR). Through a sustained engagement with historical sociology, HSIR scholars have not only developed a deeper understanding of the socio-temporally changing character of international processes, thereby going beyond the timeless and static logic of anarchy, but have also asserted the relevance of IR for processes conventionally explained through internal sociological factors such as nationalism, racism, industrialization, revolution, and democratization (inter alia Yalvaç 1991; Rosenberg 1994; Halliday 1999; Hobden and Hobson 2002; Teschke 2003; Lawson 2004; Lacher 2006; Dufour 2007; Morton 2007, 2011; Bhambra 2010; Zarakol 2011; Green 2012; Lacher and Germann 2012; Matin 2013a; Anievas and Nişancioğlu 2015; Buzan and Lawson 2015; Evans 2016; Morton and Bieler 2018). As such, HSIR has provided new insights into the coconstitution of the social and the international, which other critical approaches to IR that are underpinned by a strongly subjectivist epistemology are not able to deliver (Walker 1993; Wendt 1999). In particular, the scholars informed by poststructuralist perspectives have powerfully revealed the role of power-knowledge connections in the making of IR as a modern discipline (Tickner and Waever 2009; Vitalis 2015), yet, they also shied away from a macrohistorical sociological understanding of the constitution of the modern social and international order, which is the gap HSIR seeks to fill (Matin 2013b).

That said, despite the long-standing rapprochement between historical sociology and IR, HSIR has turned into a truly “transdisciplinary” enterprise only in the last decade. The late Fred Halliday was the first IR scholar who openly asked how to theorize the mutually constitutive character of social and international relations. As early as 2002 he hinted at the need for a “unified” theory of “international sociology” to better explain the simultaneity of the social and the international (Halliday 2002). Until more recently, however, Halliday’s call for an “international sociology” remained merely a fleeting reflection. Halliday himself planted the seed of a unified theory, yet never gave it a systematic treatment. Justin Rosenberg’s reworking of the concept of uneven and combined development has precisely addressed this gap in HSIR. Over the past decade, Rosenberg’s endeavors, alongside other valuable contributions, have led to the birth of International Historical Sociology as a new subfield (Rosenberg 2006; Hobson et al. 2010).

Uneven and Combined Development: Modernity, Temporality, Multilinearity

If the theoretical interiorization of the international to the social is central to the development of IHS, the theory of UCD provides the tools for such a conceptual digestion. This theoretical framework was originally formulated by Leon Trotsky to make sense of the “peculiar-ity” of the Russian path to modernity.¹¹ International Relations scholars have systematized and expanded on Trotsky’s insights to overcome the ontological binary of the social versus the international. The point of departure for UCD is the assumption that the world always contained not one but a multiplicity of polities and societies endowed with different social, institutional and environmental charac-

¹¹ In formulating UCD, Trotsky’s main concern was to find an answer to the question as to why the socialist revolution did not happen in the industrialized core of Western Europe, but Russia. Trotsky broke away from the evolutionary and “stagist” readings of Marxism (present in the early writings of Karl Marx and turned into “iron laws” by Stalin) by bringing in the catalytic and complexifying impact of international relations on the transformation of social relations. According to Trotsky, modern history cannot be understood as a linear and homogenizing process of bourgeois modernization, precisely because capitalist modernization takes place in the context of the competitive relations of an already existing and unevenly developed system of states.

teristics; therefore unevenness is an enduring feature of human history. Furthermore, unevenness, which is inherent in the condition of societal multiplicity, leads to a continuous process of combination. That is, pressures generated by intersocietal unevenness compel geopolitically “less developed” societies to learn from and selectively combine with local social resources the “best” aspects of geopolitically more “advanced” societies. If they survive this process, they can mobilize existing institutions to execute novel tasks, and through this process of “substitution,” they can attempt to make up for the institutions and relations that, while available to the geopolitical enemy, are missing at home. Combined development (and substitution) thus points to a process in which a geopolitical enemy becomes a teacher, showing the kinds of transformations that would facilitate a geopolitical “catch-up” (e.g. Anievas and Nişancıoğlu 2015: 50; Matin 2013a: 19). These attempts at “learning,” “substitution” and “catch-up” ultimately result in the emergence of various combinations of the domestic and the foreign, which, in turn, reacts back on the international, leading to the transformation of the initial conditions of unevenness.

At a conceptual level, then, UCD accomplishes three interrelated things. First, in this analytical framework, unevenness, hence internationality, is not merely an afterthought, but an organic component of the social from the beginning. The international is not something that enters the analysis from without as a suprasociological category. Instead, UCD postulates a conception of the international that is diachronic and interior to sociological processes themselves. Second, UCD facilitates a historically dynamic conception of international relations, which, in turn, furnishes us with a conceptual key to moving beyond the world of historical exceptions, deviations and *Sonderwegs*. In other words, by capturing the cumulatively changing nature of international relations, UCD frees sociological imagination from a framework of analysis in which historical particularities are seen as exceptions or aberrations from a purportedly universal history, and by doing so, it turns the alleged exceptions into organic and constitutive parts of world history. Third, through a historically dynamic conception of the international, UCD unlocks the historically changing rules of entering modernity, thereby countering one-dimensional and unilinear conceptions of the constitution and development of the modern world. Read together, through UCD, international

interactivity, alterity and multilinearity necessarily enter the ontological constitution of what we call historical “development.”¹²

In short, UCD departs from the internalist conceptions of social change and equips us with an important tool to build a historically dynamic and sociological IR theory. Through UCD, a cumulatively changing international system is advanced, which, in turn, logically and historically undermines unilinear conceptions of modernity (Anievas 2015: 845). Clearly, UCD is not alone in its attempt to supplant unilinear conceptions of modernity. Two approaches are especially noteworthy: multiple modernities and postcolonialism (cf. Matin 2013a: 2). According to the multiple modernities paradigm, modernization has been “shaped in each society by the combined impact of their respective historical traditions and the different ways in which they became incorporated into the new modern world system” (Eisenstadt 2000: 15). In other words, different historical and international legacies have engendered distinct forms of modernity, hence the inherent plurality of modernization experiences and the inapplicability of Western modernity as a world historical yardstick. In a similar vein, postcolonial theory (particularly its subaltern variants that take Marxism as one of their primary interlocutors) rejects “any universalist narratives of capital” by positing the contested, heterogeneous and hybrid character of colonial modernity. By registering the spatially differentiated nature of capitalist social relations, postcolonial theory invokes difference and interconnectedness as ontological conditions, thereby conceptualizing capitalist modernity away from cultural particularism and homogenizing universalism (Chakrabarty 2000: 9–21, 70, 85).

In approaching the question of historical difference, both the multiple modernities paradigm and postcolonial theory repudiate unilinearism, acknowledging the contested and spatially interactive experience of global modernity. In this respect, both approaches share many affinities with IHS. Yet two important differences remain. First,

¹² The concept of “development” is surely one of the “organizing myth(s) of our age” (McMichael 2000: 668). Yet, in a framework informed by UCD, development is not used to bolster a stagist understanding of history in which development has a unilinear direction. To the contrary, the uneven and combined character of development is a constant reminder of development’s multilinearity and heterogeneity in world history (Rosenberg 2020; cf. Blaney and Tickner 2017).

although these approaches are underscored by an internationalist critique, their proponents (like the historical sociologists discussed earlier) leave the international “analytically unpenetrated,” that is, the international itself remains “untheorized in sociological terms” (Rosenberg 2006: 310; 2008: 85). This, in turn, limits their ability to illuminate the cumulatively developing content and hence the multilinearity of global modernity (Matin 2013a: 2; Anievas and Nişancıoğlu 2015: 39–42; Buzan and Lawson 2015: 59–60, 330). Second, while existing approaches tend to take “European modernity” at face value, IHS problematizes it. For example, Alexander Anievas and Kerem Nişancıoğlu argue that postcolonial theory suffers from “lack of any substantive engagement with the question of how capitalism emerged” in Europe “before being subsequently expanded globally.” They insist that “in order to truly ‘provincialize’ Europe we must dissect European history itself, and there is no more central myth to be dissected than that of narrating European history around the history of capitalism” (Anievas and Nişancıoğlu, 2015: 40). This echoes Sandra Halperin’s warning that without deconstructing “fictitious views of Europe’s development and history” a mere emphasis on multiplicity and hybridity falls short in overcoming unilinear conceptions of historical development (Halperin 2006: 60). Likewise, Kamran Matin writes that postcolonial theory successfully reveals the differentiated, hybrid and ambivalent character of colonial modernity, yet it “does not account for, or even address, the initial crystallization of . . . capital in Europe,” thereby failing to explain the heterogeneous constitution of the origins of capitalism (Matin 2013a: 364).

In short, theorization of a truly multilinear account of global modernity is firmly connected to our ability to undermine “the myth of European modernity.” No doubt, one of the most sophisticated attempts in IHS seeking to problematize “European” modernity is the work of Anievas and Nişancıoğlu (2015). According to Anievas and Nişancıoğlu, any explanation of the origin and consolidation of capitalist modernity in Western Europe has to move beyond the “internalist” conceptions of social change (2015: 55). Internalism “presupposes a discrete and hermetically sealed European history,” hence perpetuating the image of the European transition to capitalism as an “exceptional, pristine and autonomous” process (2015: 40). In advancing their critique of internalism, Anievas and Nişancıoğlu use the critique of the concept of “bourgeois revolution” as one of their

main entry points. The conventional narratives of the “rise of the west” have long considered bourgeois revolutions as one of the main drivers of modernities in the West. In this conception, it has been assumed that the “bourgeois” classes, increasing their weight in the economic and political life through the early modern period, gradually tipped the balance of power against *ancien regime* forces, leading to the establishment of liberal economic (and political) institutions characteristic of Western modernity. Anievas and Nişancıoğlu are well aware of the widely held empirical dissatisfactions with the conventional interpretation of this concept (2015: 177–8). Following the revisionist historiography of the last fifty years, they argue that neither in the West nor in the non-West were there strong bourgeois classes dedicated to carrying out their “historic mission” of transforming society along capitalist lines. Most bourgeois revolutions in the West, such as the French Revolution, “were not heralded by the ascendancy of a distinctly capitalist bourgeois class; during the revolutions, the bourgeoisie were not in the lead of the movements and were often found on the opposing sides; [and] after the revolutions, the bourgeoisie did not hold power and were often further removed from state control” (Anievas and Nişancıoğlu 2015: 177).

For Anievas and Nişancıoğlu, what rests behind the inflation of bourgeois agency in orthodox accounts of bourgeois revolution is that they subscribe to internalist interpretations of historical change, which occludes the uneven and combined character of revolutionary processes. Anievas and Nişancıoğlu seek to move beyond the problem of internalism and lack of capitalist agency that troubled the conventional conception of bourgeois revolution by: (1) bringing (geo)political relations into the making of bourgeois revolutions; and (2) focusing on the consequences of, rather than the intentions or composition of the agents involved in, revolutions. According to this “consequentialist” reading, it is, in fact, futile to look for the involvement of a capitalist bourgeoisie in order to identify bourgeois revolutions, for the bourgeoisie’s rise to power, both inside and outside the West, was complicated by the UCD of capitalist social relations. That is, the spatially “uneven” development of capitalist social relations generated geopolitical pressures on “backward” ruling classes in Europe, forcing them to initiate or precipitate capitalist transformation in their own societies. Geopolitics, not the bourgeoisie, was thus the driving force behind bourgeois revolutions. Old social forms were combined with new ones

under geopolitical duress, which marked the inherently contradictory and internationally driven character of capitalist development. From this perspective, then, the ideal-typical models of bourgeois revolution are, by definition, misleading (Anievas and Nişancıoğlu 2015: 199–205; also, see Davidson 2012: 508–9). The implication is that given their “uneven and combined” character, bourgeois revolutions, both inside and outside the West, should be disassociated from the image of a “revolutionary” bourgeoisie executing its historical “mission” and a clear-cut ascendant capitalism. Bourgeois revolutions should be conceptualized more flexibly, judged only according to their long-term developmental outcomes, that is, according to the degree to which they fostered “a distinctly capitalist form of state” and “an autonomous center of capitalist accumulation” (Anievas and Nişancıoğlu 2015: 177; for similar interpretations see Morton 2011: 46; Davidson 2012: chapter 19; Allinson and Anievas 2010).

Anievas and Nişancıoğlu thus advance UCD as a conceptual remedy for the problem of internalism and highlight the usefulness of UCD to dismantle stylized assumptions about Western European modernity. Yet, it is equally important to note that UCD underlined by consequentialism succumbs to a form of presentism, which in turn obscures the heterogeneity of social forms generated by bourgeois revolutions. According to the consequentialist interpretation, it is (long-term) outcomes, not agents or causes, that identify a revolution’s socioeconomic character. From this angle, revolutions are “capitalist” as long as they launch a long-term process of removing “obstacles” to the development of capitalism. Therefore, bourgeois revolutions, however imperfectly and belatedly, from below and otherwise, are construed as leading to capitalism from the very outset. What bourgeois revolutions facilitated, then, was nothing but “capital insert[ing] itself into ... an uneven developmental process, gradually gaining mastery over it” (Allinson and Anievas 2010: 473), or “assimilations to modernity” through “processes of primitive accumulation” (Morton 2007: 607).

The implication is that the consequentialist readings of bourgeois revolutions tend to freeze the social content and meaning of revolutionary processes with an overdose of a priori logic of capitalist development. Uneven and combined development, propelled by a consequentialist mode of explanation, allows social agents to act only in the shadow of a (distant) capitalist future (Teschke 2005: 5–6;

Matin 2013a: 48–9; Duzgun 2018b). In this sense, consequentialism acts as a form of presentism: it reads capitalism backward by overburdening the agents of revolutionary change with a pre-given conception of capitalism. The implication is that the presentist or consequentialist readings of history tend to undermine the methodological premises and empirical promises of UCD. For example, contrary to their self-proclaimed anti-unilinear conception of world history, Anievas and Nişancioğlu's consequentialist reading of UCD is able to concede heterogeneity within Western Europe only within an all-absorbing conception of capitalism. They tend to overlook that bourgeois revolutionary processes even in the West might lead to an amalgamation of conflicting interests, intentions and principles, which, in turn, may generate contradictory results for the development of capitalism. In consequentialist accounts, as a result, social and geopolitical complexities, uncertainties and noncapitalist alternatives that might arise during revolutionary processes get lost in an all-absorbing and pre-given conception of capitalism. Anievas and Nişancioğlu consequently build a historical narrative in which all modernization projects with a bourgeois component are reduced to different instances of a single transitional social type, all moving at different speeds and by different paths toward capitalist modernity. Taken as a whole, Anievas and Nişancioğlu's interpretation of combined development rules out from the very beginning the possibility of alternative noncapitalist (and nonsocialist) modernities.

“Alterity” is thus subordinated to “posterity” in consequentialist accounts. The cost of this failure is high. For example, as I will elaborate in Chapter 3, such a tendency to project the logic of capitalism backward severely occludes the combined character of one of the most critical junctures in modern European history, the French Revolution. For, irrespective of the continuing historiographical debate as to whether the French Revolution facilitated the development of capitalism,¹³ it is certain that the revolution also gave birth to novel social forms that had contradictory implications for the development of

¹³ For views within IHS that emphasize (explicitly or otherwise) the noncapitalist nature of absolutist and revolutionary France, see Teschke (2003, 2005), Matin (2013a) and Shilliam (2009); for a contrasting view, see Anievas and Nişancioğlu (2015). For an empirical and theoretical assessment of these two rival positions from non-IR perspectives, see Comninel (1987) and Miller (2012), cf. Davidson (2012).

capitalism, that is, forms that were absent in capitalist England and cannot be easily explained by the dictation of any capitalist rationality, such as the consolidation of small peasant ownership, universal conscription, universal citizenship and equality, universal education, and popular conceptions of the “nation” (e.g. Skocpol 1979: 175–9; Furet 1981: 119–20). Surely, to make such an argument, one does not have to go as far as some scholars who totally deny the relevance of the French Revolution for the development of capitalism (e.g. Comninel 1987). Yet, what needs to be acknowledged is that consequentialism or presentism tends to obscure the fact that even in Western Europe, different social forms were created under geopolitical duress, which attempted to “substitute” (at least for a while) capitalist modernity with noncapitalist (and nonsocialist) forms of rule and appropriation (Shilliam 2009: chapter 2; Matin 2013a, 2019; Duzgun 2018b, 2018c). Such an oversight causes even one of the most radical and innovative periods in French history, that is, “the Jacobin phase of the French Revolution,” to be reduced to a form of “proto-capitalism” (Rosenberg 2007: 478).

In short, for a truly multilinear conception of modernity we need to avoid the methodological trap of presentism. The critique of internalism without a full-on critique of presentism fails to save us from the trap of unilinearism. The history of global modernity must be conceptualized without presuming the necessary arrival of capitalism in the West as well as in the non-West. We need to be able to historicize and internationalize “multiple modernities” without falling back into presentist conceptualizations of capitalism’s rise and development. As I will show later, IHS, once freed from such retrospective readings of history, will be able to reveal with more precision the spatially and temporally interactive character of world historical development and the multiplicity of modernities generated therein.

Renewing International Historical Sociology

At this point what is becoming clear is that IHS and PM must join forces for a noninternalist and nonpresentist conception of global modernity. International Historical Sociology needs PM to avoid circular explanations of capitalism’s rise and expansion, while PM needs IHS to systematically signpost the temporal, processual and sequential dimension of global modernity. International Historical Sociology and

PM provide two complementary entry points to the process of historicization of modernity. Political Marxism's conception of capitalism as market-dependence focuses on the political/legal/institutional moment of the origin of capitalism, thereby diverting our attention from transhistorical phenomena usually considered as preconditions to the birth of capitalism such as commerce, wealth or wage labor. It argues that only when people are enabled/compelled to depend on the market for their means of subsistence, does capital begin to invade the productive process and systematically alter the conditions of life.

In addition to capitalism's historicity, PM recognizes capitalism's international dimension too. That is, PM insists that there can be no "transhistorical laws" governing the path to capitalism, because of the changing intersocietal context of capitalist transformation as well as the variations in social reactions from "below." For "once breakthroughs to ongoing capitalist economic development took place in various regions these irrevocably transformed the conditions and the character of the analogous processes, which were to occur subsequently elsewhere" (Brenner 1985b: 322; see also Brenner 1986: 29). In other words,

once capitalism was established in one country ... its development in other places could never follow the same course it had in its place of origin. The existence of one capitalist society thereafter transformed all others, and the subsequent expansion of capitalist imperatives constantly changed the conditions of economic development. (Wood 1998: 30)

Thus, by recognizing the cumulatively changing character of international relations, PM defies transhistorical interpretations of market-dependence. This implies that while market-dependence signifies the minimum sociolegal prerequisites to the existence of capitalist social relations, its focus cannot be on any static phenomena/policy. For example, equating capitalism to wage labor per se tends to obscure that under certain sociolegal circumstances, nonwage forms (such as commodity production based on nonwaged family labor) can and have permitted "a more or less direct transition to capitalism" without widespread dispossession of the workforce (Brenner 1977: 52; Wood 2001b: 176–7). Therefore, depending on past socioinstitutional legacies and the timing and international context of capitalist transition, the mechanisms that ensure market-dependence take different forms. The socioinstitutional content of market-dependence is not fixed, but

cumulatively changes. As a consequence, PM neither sets up pre-given norms for the transition to capitalism, nor does it treat subsequent transitions as counter models to privileged ideal types.

All this hints at PM's potential to incorporate the international into the explanation of the social. However, it is important to note that even if the international and temporal dimension of social transformation is somewhat present in Brenner and Wood's work, neither Wood nor Brenner were IR scholars, therefore they did not address the question of the international in a systematic way that would fulfill IR's own disciplinary considerations. In other words, they both remained "comparativists," for whom the question of difference was more important than the question of interconnection. Indeed, this has been the lacuna that Political Marxists who work in the field of IR have acknowledged and sought to fill (inter alia Teschke 2003; Lacher 2006). Political Marxism in IR has moved beyond Brenner and Wood's comparativist focus by highlighting the generative impact of the international on the processes of early modern state formation and vice versa. They have problematized the common conception of the simultaneous emergence of capitalism and the territorial state, and in doing so, they have revealed the role of temporally specific and interactively developing strategies of spatialization in the constitution of the modern international order (Teschke 2003: 265; Teschke and Lacher 2007: 569).

In fact, in emphasizing the temporal and interactive character of world historical development, PM in IR even invoked the concept of uneven and combined development in the early 2000s. For example, Benno Teschke wrote in 2005 that combining PM "with the theorem of socially uneven and geopolitically combined development" can facilitate a deeper understanding of "the nationally specific and diachronic, yet cumulatively connected and internationally mediated nature of capitalist transitions" (Teschke 2005: 13, 21). Of course, this disciplinary reorientation via uneven and combined development intended to further clarify PM's relevance for IR. Yet, the opposite is also true. Teschke's use of UCD was based on the precondition that UCD itself was sterilised from transhistorical assumptions about capitalist development (Teschke 2014: 34–6).

Unsurprisingly, the issue of "historicity" has since remained the main bone of contention between the theoreticians of PM and UCD. While some UCD theoreticians have begun to rebrand the concept

since the mid-2000s as a general theory of international relations, PM and other critics have argued against the formalization of UCD as a transhistorical concept (Rioux 2009; Teschke 2014). In particular, the insistence to conceptualize UCD as a postpositivist substitute for “anarchy” has countered the concept’s earlier claim to specify the role of social agency in the constitution of social and international orders. The underspecification of social agency, in turn, runs the risk of emptying the historical-sociological content of the international: the “how” and “why” of the international, that is, how and why social and international dynamics evolved across time and space, and the exact mechanisms of this transformation, tend to disappear in narratives informed by an agent-less framework of international historical change (Rioux 2015; Duzgun 2021). Uneven and combined development, albeit extremely innovative, eventually risks becoming just another word for “multiplicity,” “interconnectedness” and “hybridity,” losing its explanatory power and theoretical significance grounded in historical materialism (cf. Matin 2013a).

Yet, does it have to be like this? In my view, no. For, UCD, in principle, points to an agency-led transformation during which the geopolitically less-developed society learns from and selectively adopts the traits of a geopolitical foe. In other words, UCD is underlined by a process of intersocietal learning, emulation and substitution; therefore logically and historically presupposing “active social agency” as the driver of social and international transformation. Therefore, as long as UCD is operationalized in a way that highlights the agential struggles over the organization of space and the concomitant acts of intersocietal comparison, intersocietal learning and substitution, it has the potential to dodge the charge of asocial readings of international change (Duzgun 2021).

In short, UCD, if freed from transhistorical assumptions, can serve as a constant reminder of the interactive and cumulative character of international social change, hence facilitating with greater ease a history-in-motion. In this sense, I suggest, IHS and PM, combined together, can activate a nonpresentist and noninternalist methodology adequate for the historicization of global modernity. On the one hand, UCD allows PM to signpost more systematically the temporal, sequential and cumulatively developing content of global modernity. Political Marxism, underpinned by UCD, traces temporal processes diachronically, hence decisively departing from the logic of synchronic

comparisons. On the other hand, UCD, underpinned by PM, focuses more systematically on the historically specific sociospatial struggles, hence enabling a deeper understanding of sociohistorical causality, which is a prerequisite for international historical sociological imagination to develop. Uneven and combined development, combined with PM, stops seeing capitalism as somehow always in the air, waiting to be unravelled once favorable commercial or demographic developments take place. As a consequence, it ceases viewing multiple modernities as differentiated moments of subterraneously developing capitalisms, but as the multiplicity of attempts at emulating, selectively adapting or completely substituting capitalism (Teschke 2003; Shilliam 2009; Matin 2013a, 2020).¹⁴ In the rest of this book, I will flesh out a historical narrative informed by these theoretical insights.

Conclusion

The political, the economic, the social and the international are specifically modern categories, each considered to be the subject matter of a distinct academic discipline. The starting point of this chapter was the claim that historicization of modernity was not feasible without problematizing and moving beyond the disciplines and categories created by modernity itself. The process of “moving beyond” implies that the history of modernity cannot be studied through fragmented or interdisciplinary methodologies. For, fragmented methodologies, even when they emphasize the interaction between multiple social spheres and academic disciplines, remain committed to a problematic ontology that takes as given the structure of modern society, which ultimately impoverishes our understanding of the past, present and future. What is at stake, therefore, is not a mere modification or a quick fix, but a complete overhaul of the process of historicization based on transdisciplinary methodologies. Transdisciplinarity is the key to developing a holistic ontology that does not see the past as an homunculus of the present both in social and spatial sense.

In developing such a transdisciplinary approach, I have used two methodological critiques, the critique of methodological presentism

¹⁴ Hannes Lacher, 2015. “Polanyian Perspectives on Global History,” unpublished paper, presented at Max Planck Institute for Social Anthropology, Halle, Germany.

and the critique of methodological internalism. Of course, several scholars in historical sociology and IR have advanced similar methodological critiques, charging conventional approaches with a tendency to read back the analytical binaries that characterize the modern present (e.g. Rosenberg 1994, 2013; Hobson 2002; Buzan and Little 2010; Anievas and Nişancıoğlu 2015; Go and Lawson 2017). Yet, these two modes of critique have yet to be sufficiently combined into a single analytical framework that scrutinizes the specificity, temporality and multilinearity of world historical development. I have proposed that an IHS, underpinned by PM, can deliver the promise of a truly nonpresentist and noninternalist conception of world historical development.