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# PATHS OF MODERNISATION: CATCH-UP VS TAKE-OFF<sup>1</sup> AN INTRODUCTION INTO THE COMPLEXITIES OF SELF-SUSTAINED DEVELOPMENT

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The concept of complexity (i.e. non-linear dynamics) makes tremendous (epochal) contribution to general systems analysis in the sense that it offers the broadest possible (“unifying”) theoretical perspective not only for natural (physical, chemical and biological) but also for social systems research. The integrating and differentiating effects (convergent and divergent tendencies) of globalisation and regionalisation are such complex social phenomena, involving multiple mutual determinations and positive and negative feed-back/feed-forward effects among the sub-systems of the world system, the current understanding and proper interpretation of which would require the application of the most advanced and appropriate means of scientific inquiry from students of humanities in the broad sense. To view the inseparable aspects of socio-economic structure and function as a whole was made possible by the advent and intervention of the (not so) new science of complexity. According to the report by the *Gulbenkian* Commission, set up by outstanding scholars of various disciplines from all over the world:<sup>2</sup>

“The importance of complex systems analysis for the analysis of social science is far-reaching. Historical social systems are quite clearly composed of multiple, interacting units, characterized by the emergence and evolution for nested hierarchical organization and structure, and complex spatiotemporal behavior. Furthermore, in addition to the kind of complexity exhibited by nonlinear dynamic systems with fixed, microscopic mechanisms of interaction, historical social systems are composed of individual elements capable of internal adaptation and learning as a result of their experience. This adds a new level of complexity (one which is shared with evolutionary biology and ecology) beyond that of the nonlinear dynamics of traditional physical systems. The conceptual framework offered by evolutionary complex systems as developed by the natural sciences presents to the social sciences a coherent set of ideas that matches long-standing views in the social sciences, particularly among those who have been resistant to the forms of nomothetic analysis inspired by the science of linear equilibria. Scientific analysis based on the dynamics of nonequilibria, with its

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<sup>1</sup> This is the revised version of our original English language piece, published only in German so far (Lévai–Szatmári, 2013).

<sup>2</sup> *Immanuel Wallerstein* (USA), chair of the Commission, sociology; *Calestous Juma* (Kenya), science and technology studies; *Evelyn Fox Keller* (USA), physics; *Jürgen Kocka* (Germany), history; *Dominique Lecourt* (France), philosophy; *Valentin Y. Mudimbe* (Zaire), Romance languages; *Kinhide Mushakoji* (Japan), political science; *Ilya Prigogine* (Belgium), chemistry; *Peter J. Taylor* (UK), geography; *Michel-Rolph Trouillot* (Haiti), anthropology.

emphasis on multiple futures, bifurcation and choice, historical dependence, and, for some, intrinsic and inherent uncertainty resonates well with important traditions of the social sciences.” (Wallerstein *et al.*, 1996: 63–64)

### ***Modes of Accumulation of Capital***

*“The country that is more developed industrially only shows, to the less developed, the image of its own future.” (Marx, 1990: 91)*

In the late 1980s, paraphrasing the Marxian maxim – “the country that is less developed industrially only shows, to the more developed, the image of its own past” (Lévai, 1989: 185) – one of us called attention to the adverse social and economic developments in Eastern Europe of that time. The image shown by less developed to the more developed countries reflects the phenomena of the historical socio-economic patterns of primitive accumulation of capital. The phase of primitive (original) accumulation, when capital comes into the world “dripping from head to toe, from every pore, with blood and dirt” (Marx, 1990: 926), does not, as a matter of fact, end in a historical period of modern (“liberal”) capitalist social and economic relations having become predominant. Pre-capitalist (“traditional”) modes of production, providing the original sources of capital accumulation, turn to be “overcome and preserved”, subordinated and reproduced, by capital. In Marx’s own words as he put it in his rediscovered and long celebrated but finally forgotten and neglected chapter of *Das Kapital*:

“If the production of absolute surplus-value was the material expression of the formal subsumption of labour under capital, then the production of relative surplus-value may be viewed as its real subsumption. At any rate, if we consider the two forms of surplus-value, absolute and relative, separately, we shall see that absolute surplus-value always precedes relative. To these forms of surplus-value there correspond two separate forms of the subsumption of labour under capital, or two distinct forms of capitalist production. And here too one form always precedes the other, although the second form, the more highly developed one, can provide the foundations for the introduction of the first in new branches of industry. [...] The form based on absolute surplus-value is what I call the *formal subsumption of labour under capital*. I do so because it is only *formally* distinct from earlier modes of production on whose foundations it arises spontaneously (or is introduced), either when the producer is self-employing or when the immediate producers are forced to deliver surplus labour to others. All that changes is that compulsion is applied, i.e. the method by which surplus labour is extorted.” (Marx, 1990a: 1025)

“Pure” (closed) capitalist economy, though theoretically capable of self-sustained growth, penetrates and permeates surviving (“impure”) pre-capitalist socio-economic relations, sponges on them, thus exploiting extra sources of self-sustaining capital accumulation, i.e. extended reproduction (Lévai, 1989: 185). Putting it more explicitly and more precisely: primitive (*original*) accumulation of capital is expropriation of *absolute surplus value* produced by labour *formally* subsumed under capital (i.e. of a negative “historical and moral element” deduced from wages and incomes as a result of the “historical and moral” pressure of pre-capitalist modes on the specifically capitalist mode of reproduction a labour power), whereas the source of the specifically capitalist (using our own term: *organic*) accumulation of capital is production of *relative surplus value* (that is a positive difference between the value and the price of production of labour power) based on the *real* subsumption of labour under capital. Clearly, the two modes of subsumption of labour under, and accumulation of, capital coexist in and by each other (Lévai, 1983: 47) and represent “states” (phases) in space but definitely not “stages” (periods) in time as originally suggested by Walt Withman Rostow (Rostow, 1958 and 1990). What some mainstream economists praised loudly as “modernisation” was but the expansion of specifically capitalist accumulation, spreading the capitalist social and economic relations throughout the globe.<sup>3</sup> The pattern (“model”) of modernisation based on growing productivity of and increasing consumption by labour has, however, got to enter into imperfect competition with recurrent and concurrent patterns.

### ***Interpretations of Modernisation and Modernity***

The motto we chose to the present introduction into the complexities of sustainable development is one of the most controversial statements by Marx – if interpreted out of the original context. Alexander Gerschenkron, however, made a considerable, though somewhat tautological, comment on it which we feel obliged to quote at some length:

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<sup>3</sup> In his *Ontology of Social Being*, George Lukács, Hungarian philosopher, discussing the “universalisation of capitalist production” in some detail, explicitly referred to and relied on the Marxian distinction between primitive and specifically capitalist modes of accumulation (Lukács, 1986) what one of his best renegade students, Ágnes Heller, is apparently unaware of (Heller, 1991). Anyhow, it seems to be relevant to cite Marx’s forgotten text at some length here again:

“With the *formal* subsumption of labour under capital the *compulsion* to *perform surplus labour*, and to create *leisure time* necessary for development independently of material production, differs only in form from what had obtained under the earlier mode of production. ... But this formal change is one which increases the continuity and intensity of labour; it is more favourable to the development of *versatility among the workers*, and hence to increasing diversity in modes of working and ways of earning a living. Lastly, it dissolves the relationship between the owners of the conditions of labour and the workers into a *relationship of sale and purchase, a purely financial relationship*. In consequence the process of exploitation is stripped of every patriarchal, political or even religious cloak. It remains true, of course, that the *relations of production* themselves create a new relation of *supremacy and subordination* ... But the more capitalist production sticks fast in this formal relationship, the less the relationship itself will evolve, since for the most part it is based on small capitalists who differ only slightly from the workers in their education and their activities. The variations which can occur in the relation of *supremacy and subordination* without affecting the mode of production can be seen best where *rural* and *domestic* secondary industries, undertaken primarily to satisfy the needs of individual families, are transformed into autonomous branches of capitalist industry.” (Marx, 1990a: 1026–1027)

“A good deal of our thinking about industrialisation of backward countries is dominated – consciously or unconsciously – by the grand Marxian generalisation according to which it is the history of advanced or established industrial countries which traces out the road of development for the more backward countries. [...] There is no doubt that in some broad sense this generalisation has validity. It is meaningful to say that Germany, between the middle and the end of the last century, followed the road which England began to tread at an earlier time. But one should beware of accepting such a generalisation too whole-heartedly. For the half-truth that it contains is likely to conceal the existence of the other half – that is to say, in several very important respects the development of a backward country may, by the very virtue of its backwardness, tend to differ fundamentally from that of an advanced country,” (Gerschenkron, 1962: 6–7)

As regards the other half of the truth, we invite the readers’ attention to a letter to the Editorial Board of the Russian journal *Otechestvenniye Zapiski* (written in 1877 but never mailed and which was found by Engels among Marx’s papers after the death of the author), in which Marx made a concluding remark as follows:

“... events strikingly analogous but taking place in different historical surroundings led to totally different results. By studying each of these forms of evolution separately and then comparing them one can easily find the clue to this phenomenon, but one will never arrive there by using as one’s master key a general historico-philosophical theory, the supreme virtue of which consists in being supra-historical.” (Marx–Engels, 1975: 294)

For us it is Tamás Szentes’s committed message (Szentes, 1985 and 2003) and Kálmán Kulcsár’s enlightened argumentation (Kulcsár, 1992), in particular, and Ralph Dahrendorf’s sparkling and penetrating book<sup>4</sup>, in general, that reinforce our conviction in the feasibility of complex and rational way of thinking about modernisation and modernity. Reviewing the seminal contribution of Andre Gunder Frank to the co-evolutionary interpretation of “development of underdevelopment” in world capitalist economy, Szentes grasps the differences between the lines of imitative (“catch-up”) “Westernisation” transplanted from outside and of complex socio-economic development based on autochthonous (“take-off”) modernisation with an insight. (cf. Szentes, 1985: 296) Few are the authors who – although not referring to the implications of the theory of complex systems explicitly – are interpreting interdependency as multiple mutual but genuinely asymmetrical determinations and

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<sup>4</sup> “I myself spoke of »post-capitalist society« in my book on *Class*. And under influence of the excitable 1970s, I began a long manuscript entitled »Modernity in Eclipse«, which fortunately I did not publish. The redeeming feature of its title is that it avoids »postism«, though only just; an eclipse passes and through a glass darkly one can see the sun return unscathed. For me at any rate, the sun of modernity has returned.” (Dahrendorf, 1988: xiv)

– consequently – the world economy as historically evolved organic (i.e. non-linear and dynamical) system, such as Szentes. (cf. Szentes, 2003: 73)

Kulcsár, the late “father” of modern Hungarian sociology, with imposing intuition proved that the question of modernisation cannot and should not be reduced to problems of semantics or to the “Modernisation vs. Westernisation” (taking-off as opposed to catching-up) dichotomy of “developmentalism”. He, applying the criterion of “organic development”, came to the social and economic content of the concept of modernisation closer than any other Hungarian author (the writings of whom we are familiar with) before, but at the point of defining the social resources of modernisation, that is the sources of specifically capitalist or “organic” accumulation, he came to a sudden stop. (cf. Kulcsár, 1992: 25) As we have already indicated above, the revolutionary transition from original (primitive) accumulation of capital to organic (specifically capitalist) accumulation, and the concomitant evolutionary socialisation of production and consumption in the broad sense, created the social and economic infrastructure of self-sustained growth<sup>5</sup> of modern capitalism and accommodated the superstructure of legal and political development of modern state. Original accumulation of merchant’s and usurer’s capital, referred to by Marx<sup>6</sup> as “antediluvian”, played decisive but different roles in the history of the various regions of the emerging world capitalist system.

“The transition from the feudal mode of production takes place in two different ways. The producer may become a merchant and capitalist, in contrast to the agricultural natural economy and the guild-bound handicraft of medieval urban industry. This is the really revolutionary way. Alternatively, however, the merchant may take direct control of production himself. But however frequently this occurs as a historical transition ... it cannot bring about the overthrow of the old mode of production by itself, but rather preserves and retains it as its own precondition. ... This method always stands in the way of the genuine capitalist mode of production and disappears with its development. Without

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<sup>5</sup> Please note: *self-sustained growth* and *sustainable development* are but two concepts with different meanings but some authors insist on using those not only interchangeably but also speak of “sustainable growth” in the sense of self-sustained growth. Rostow raised the issue of advancing from the stage of take-off to that of self-sustained growth in his studies published in the early 1950s (cf. Rostow, 1958), and he elaborated a consistent theory in his impressive book on the same problem. (Rostow, 1990) The concept of sustainable development is, in contrast, used by professional economists in the sense of “ecologically rational development” all over the world ever since the report by the UN Commission of Environment and Development headed by Gro Harlem Brundtland has been published (*Notre avenir à tous*. Montreal: Éditions du Fleuve, 1988). Notwithstanding the genuine Marxian idea of sustainability as follows: “From the standpoint of a higher socio-economic formation, the private property of particular individuals in the earth will appear just as absurd as the private property of one man in another man. Even an entire society, a nation, or all simultaneously existing societies taken together, are not the owners of the earth. They are simply its possessors, its beneficiaries, and have to bequeath it in an improved state to succeeding generations, as *boni patres familias*.” (Marx, 1992: 911)

<sup>6</sup> “Circulation, or the exchange of commodities, creates no value. It can be understood, therefore, why, in our analysis of the primary form of capital, the form in which it determines the *economic organisation of modern society* [emphasis ours – I.L., P.Sz.], we have entirely left out of consideration its well known and so to speak antediluvian forms, merchant’s capital and usurer’s capital.” (Marx, 1990: 266)

revolutionising the mode of production, it simply worsens the conditions of the direct producers, transforms them into mere wage-labourers and proletarians under worse conditions than those directly subsumed by capital, appropriating their surplus labour on the basis of the old mode of production.” (Marx, 1992: 452–453)

### ***Social and Economic Complexity***

“... after so many failed prophecies, is it not in the interest of social science to embrace complexity, be it at some sacrifice of its claim to predictive power?” (Hirschman, 1992: 139)

It will be worth quoting *Francis G. Elliott's* lucid paper on the relevance of the world vision of *Teilhard de Chardin* in order to advance and make the meaning of “complexification” clear right from the beginning:

“»Complexification« is a term which ... was coined by Teilhard and has since come into common use. [...] One sees what it means, or rather one is too ready to think that one sees: the accumulation of matter has allowed its arrangement in complexes from which a new and superior system has emerged. So far so good. But we should be less ready to agree with someone who allowed himself to be led into associating the idea of »complex« with the idea of the »complicated«, the »involved«, or the »disordered«, since the exact opposite is true. The complexity of the protein is not disorder but supreme order. An orchestral score is complicated to someone who cannot read music, but it would be highly incongruous to call Bach's music complicated. The involved and the indecipherable are only the apparent and completely external side what is complex. We can only speak of »complexification« so far as it evokes a hierarchy, the appearance of structures and interconnections, the formation of order, and, beyond that, the upsurge of an inner dynamism that is both interiorizing and expansive at the same time.” (Elliott, 1967: 25)

It is at this point where we think it will be convenient to return to the heart of the matter, to the essence of modernisation, to the complexities of self-sustained social and economic development. Danny Burns and Stuart Worsley, though somewhat confusingly (mis)interpreting (mixing up) Paul Narzys Rosenstein-Rodan's idea of “big push” and Rostow's “take-off” (Burns–Worsley, 2015: 9–10), correctly emphasise:

“Complexity per se is not a problem. [...] The problem is that solutions to problems within complex environments are constructed as if they weren't complex. [...] With a fundamental readjustment of the underlying principles of programmed improvement, development impact is not only possible but

also likely. This depends on understanding how change happens and what sorts of interventions are congruent with that understanding.” (Burns–Worsley, 2015: 18)

Several authors (e.g. Apter, 1965 and 1968; Black, 1966; Fisichella, 2010; Geyer 2006; Luhmann, 1984; Urry, 2003; Wallerstein *et al.*, 1996) seem to agree that “complexification”, i.e. the evolution of complex (non-linear and dynamic) social systems, is the driving force of modernisation. It must be instructive for students of development studies how Ferenc Jánosy, Hungarian mathematician-economist, struggled with the problem of defining the starting point (take-off) of the “avalanche” of capital accumulation leading to modernity and self-sustained growth. (Jánosy, 1979) Rostow did not hesitate to reinterpret his “stages approach” and embrace the evolutionary complex systems perspective (Rostow, 1990a) several decades after having published his controversial “Non-Communist Manifesto”. The booming literature on varieties of capitalism and multiple paths of modernisation (cf. e.g. Beck *et al.*, 1994; Crouch, 2005; Crouch–Streeck, 1997; Eisenstadt, 2002 and 2003; Hall–Soskice, 2001) explicitly or implicitly proves the feasibility of such a perspective, offering a unifying theory for comparative social and economic systems analysis of historically evolved diversities of modernity.

Static simplified images of, and linear causal arguments for, an idyllic stationary and sustainable (“equilibrium”) state are built on serious misconceptions of general systems theory. It must be clearly seen that immanent positive and negative loops (including feed-back and feed-forward effects) will never be in “balance” in an open non-linear dynamical system, such as human society, in general, and world society, in particular. The only viable alternative is a self-sustained path of social system evolution within a (steady) state space (zone of attraction), limited by the initial (historical) conditions of its functioning, from which not only a “big push” but even a relatively minor (disproportionate to the effect) change in the external (environmental) or in the internal (sub-systemic) conditions may divert it. An open complex (non-linear dynamical) system cannot and will not *per definitionem* be in equilibrium since it is always at the edge of chaos. (cf. Eve *et al.*, 1997) Any intervention in the functioning of a complex system, however benevolent it appears to be, may result in unexpected effects, not to mention counter-effects, and the all-too-well-known side-effects in the fields of e.g. medicine and environmental protection. Changing the state of a society is adaptive and self-organising process that would structurally and functionally alter the interdependent and interacting system parameters. This is exactly what the American, Moroccan and Rumanian authors of the sixth report to the Club of Rome, *James Botkin*, *Mahdi Elmandjra* and *Mircea Malitza*, representing the “three worlds” of that era, stressed in the hectic 1970s when they tried to open the eyes of humankind to the complexities it created and, at the same time, broke new paths to bridge the “human gap” in its global development efforts:

“Humanity is entering a period of extreme alternatives. At the same time that an era of scientific and technological advancement has brought us unparalleled knowledge and power, we are witnessing the sudden emergence of a »world problematique« – an enormous tangle of problems in sectors such as energy, population and food which confront us with unexpected complexity. Unprecedented human fulfilment and ultimate catastrophe are both possible. What will actually happen, however, depends on another major – and decisive – factor: human understanding and action. [...] Our reluctance to face up to unpleasant realities blurs the fact that the current general crisis will get far worse before it can eventually get better. The few existing evaluations or forecasts are narrow, fragmented, or short-term. Never is our vast assortment of resources mobilized across disciplines and national boundaries with a view to pursuing common, global goals on a long-term basis. As a consequence, humanity is pitifully unprepared to cope with the formidable challenges, threats, and complexities on the immediate horizon. We must come to understand at least two critical points. One is that humanity as a whole is moving rapidly towards a momentous crossroads where there will be no room for mistakes. The second is that we must break this vicious circle of increasing complexity and lagging understanding while it is still possible to exert influence and some control over our own destiny and future.” (Botkin *et al.*, 1979: 1-2)

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