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## SYMPOSIUM: POPULISMS IN THE WORLD-SYSTEM

### Populism: A Puzzle Without (and for) World-Systems Analysis

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#### Abstract

*This essay shows how world-systems analysis provides a more rigorous explanation for the recent rise of disparate populisms, countering negative stereotypes of mainstream accounts that obscure how formative populist leaders emerged from authentic progressive movements which challenged capitalists. Existing analyses have also failed to specify the varied economic projects of populists, their likely social bases and their relationships to world markets. The essay recommends relational comparisons of populists to unravel populism's puzzles and advance world-systems analysis.*

**Keywords:** Populism, Political sociology, Latin America, Comparative methodology, Trump, Chávez

#### Populism's Puzzle

“Is Donald Trump the American Hugo Chávez?” (Grillo 2016). Grillo is not the first to ask this question. To many, Trump's popularity seems emblematic of a cresting wave of populist power: a wave many would say began with Hugo Chávez's victory in Venezuela's 1998 presidential election. Pundits catalogue numerous similarities between these two leaders. Trump uses hatred as



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a “provocation tactic” just the way one of the “world’s most famous populists,” Chávez, “use[s] hatred as a way to polarize and thus survive in office” (Corrales 2017). Trump does not “seize critical newspapers or TV stations outright.” Rather he uses “state power to pressure critics and reward friends” just like Venezuelan authorities under Chávez accused a critical TV station of “illegal profiteering” (Goldberg 2018a). Like Chávez, Trump is a “populist demagogue” who is in the process of undoing what was once “a relatively prosperous democracy” (Kristof 2018); a politician who uses “demagogic sectarian rhetoric to establish an authoritarian regime and then destroy a people” (Brooks 2018). Trump and Chávez believe that “they are smarter than everybody else and do things by themselves” (Madeline Albright as cited in Goldberg 2018b).

But aren’t there many substantive differences between Trump and Chávez? Yes, they are both economic nationalists. But Trump’s call to “Make America Great Again” and for “America First” proclaims his desire to defend, some might say regain, America’s dominant economic position within the world. Chávez’s call for “twenty-first-century socialism,” in contrast, sought to overcome dependence on U.S. oil markets, capital and technology, and to break the “oligopolistic control of the economy” by U.S. capital and their allied Venezuelan firms (Ellner 2010: 85). How can we make sense of a political trend that seemingly embraces such distinct economic projects?

So many flavors of populism would be a puzzle without a world-systems analysis. World-systems analysis provides a more rigorous reason why, despite such differences, so-called populists are on the rise. In part I, I elaborate how it does so, even as it affirms our nagging suspicion that lumping leaders like Trump and Chávez together as populists is misleading. World-systems analysis also demands that we make explicit (or concrete) a comparison which is implied whenever people label leaders populists: that of how today’s populists compare to their earlier counterparts. Part I illustrates how rooting today’s “populists” in a longer, concrete and cumulative history, reveals why labeling Chávez, let alone Trump, a populist is so problematic.

At the same time, populisms as distinct as Trump’s and Chávez’s also pose a puzzle for world-systems analysis. The rise of what we might call “right-wing populists”—such as the United States’s Trump and Italy’s newly formed government led by Conte—challenge those who have interpreted the recent populist surge as rooted either in a backlash against neoliberalism or in the structural proclivities of the semiperiphery. In part II, I elaborate why a relational methodology of comparisons, also called “incorporated comparisons” (McMichael 1990; Tomich 2018), would be ideally suited to solving such puzzles posed by “populists” today and why doing so could advance world-systems analysis.

### **Part I: Why Populism Needs A World-Systems Analysis**

World-systems analysis offers numerous insights without which the global surge in “populists” would be hard to explain. It also calls for concrete historical analyses of populist political

processes, which makes it abundantly clear why using the term populism is so problematic, and hints at why it may also be so appealing.

### **To root today's populist convergence in the dynamics and structures of capitalism**

A world-systems analysis of populism distinguishes itself from political sociology's emphasis on the social bases of politics by situating such social bases within wider dynamics and structures of the capitalist world-economy. When we do so, we see how such seemingly disparate "populists" are related to the neoliberal economic transformation of the world-economy in the late 20<sup>th</sup> century, the concomitant crisis of U.S. hegemony and liberal democracies, and the structural tendency for elite social conflict in semiperipheral societies.

A world-systems analysis might consider how to relate the recent surge in "populist" leaders to the concurrent transformations of the capitalist world-system. How, that is, might this political trend be related to the late 20<sup>th</sup> century's global convergence towards neoliberal market reforms? Certainly, the failures of the neoliberal project, especially across much of the Global South, are legion and well documented. They include the failure to produce economic growth, let alone national development, and the deepening social polarization within and between societies. Seen from this vantage point, it is not surprising that the electoral winds would shift against those parties and leaders who helmed neoliberal reform initiatives. A world-systems analyst could find plenty of evidence that the economic restructuring and social polarization associated with neoliberal or market oriented reforms left many behind in both the United States (Wuthnow 2018) and Venezuela (Roberts 2003). It is from the swelling ranks of these disadvantaged groups that Chávez and Trump draw some of their support.

Both Trump and Chávez are also indicative of a widening crisis of U.S. hegemony and its principle political vehicle: liberal democracies. World-systems analysis would zoom out to bring into focus the United States as leading this "neoliberal counterrevolution" in its bid to shore up its own position within world markets and as the world's hegemon (Arrighi 2004: 83). But the United States would not have been able to reassert its position without simultaneously "promoting polyarchy" (Robinson 1996), thereby appropriating the "anti-authoritarian and anti-statist aspirations" of the 1968 revolutions (Arrighi 2004: 83-4) even as it repressed the actual "egalitarian aspirations" of historically subordinate groups (ibid: 88). It is the artifice of representativeness and fairness within such polyarchic democracies—the primary vehicle for the U.S.-led neoliberal counter-revolution—which explains both why these democracies have lost their moral appeal and why outsiders willing to upend the political conventions of such democracies are proving so popular.

A world-systems analysis of populism might also draw inspiration from those who study the political dynamics of semiperipheral states (Arrighi 1985; Gates 2009; Martin 1990)—those

“middle-income” societies that straddle the core-periphery divide, incorporating economic activities historically common in both (Wallerstein 1974; Arrighi and Drangel 1986). Studies suggest that semiperipheral societies may be prone to intra-elite conflict, precisely because they internalize such disparate and often competing relationships to world-markets, with some elites seeking protections and others seeking further integration. Such conflict seems to have destabilizing and often unpredictable political effects, bringing down democracies (Schwartzman 1989), authoritarian regimes (Poulantzas 1976; Schwartzman 1998) or the party elites who once championed their nation’s developmental projects (Gates 2009). Might the structural proclivities of semiperipheral societies have made them particularly vulnerable to the rise of these new anti-establishment “populists”?

The fact that many populist regimes have emerged in states that could easily be defined as semiperipheral, such as Hungary, Turkey, Venezuela and the Philippines, lends further credence to this view. Some might even attribute populists in wealthy societies like the United States to a shift towards being more like semiperipheral societies with their greater internal inequality, competing economic elite interests and vulnerability to international market forces (Robinson and Harris 2000). The fact that the United States has affirmed its position as an oil exporter and that Trump peddles U.S. agricultural exports to China would support such an interpretation. Even as a world-systems analysis of populism would bring such system-level forces of convergence to light, it would also problematize populism by virtue of its insistence that we historicize politics.

### **To root today’s populisms in a longer, concrete, and cumulative history**

World-systems analysis would also remind us to make explicit what is often implicit in the denunciations of contemporary political leaders as populists: placing today’s populists in a longer concrete and cumulative history of populism. When people declare Trump or Chávez to be populists, they indirectly invoke a comparison to a longer and presumed negative history of populist leaders. In doing so, they implicitly reduce the concrete history of formative populists to a negative stereotype: that of the charismatic leader who wins with ill-defined, anti-elitist bluster. They thereby, obscure how formative populist movements and leaders emerged from authentic movements which did, in fact, challenge the entrenched interests of dominant capitalists. By insisting on analyzing “populists” as part of a longer concrete history of populism, world-systems analysis illuminates why populism is such a problematic label.

Concrete historical analyses of the formative populist movements in Latin America and the United States reveal their roots in authentic movements of historically aggrieved popular sectors for social change. Even those who emphasize the agency of populist leaders in Latin America, where many of the world’s first populist leaders actually came to power, acknowledge that these formative populists responded to the growing urban working class and “middle sectors” (Collier

and Collier 1991). Furthermore, they interpret the appeal of such populist leaders as rooted in their willingness to challenge the foreign capitalists and landed elites who had dominated since the mid-19<sup>th</sup> century (Collier and Collier 1991). By all accounts, then, they sought to assert a modicum of national autonomy, or sovereignty, from their prior modes of subordination within an international division of labor and to chart their nation's path to national development, however imperfectly and doomed to failure. Even in the United States, the People's, or Populist, Party of the 1890s "mobilized farmers and workers," the "poverty stricken and indebted," against "planters, merchants, landlords, and creditors, as well as 'Wall Street,' bankers and railroad barons" (Ali 2010: 3). Recent research also reveals how Black Populism, "an independent movement of black farmers, sharecroppers, and agrarian workers," with an estimated base of over a million, emerged parallel to white populists and greatly expanded the latter's electoral base (ibid: 6).

When people denounce a particular leader as populist today, they, perhaps inadvertently, endorse the way populism's original antagonists derided the formative populist movements and leaders. When we denounce leaders as populist, for example, we inadvertently reinforce U.S. opposition to Mexico's revolutionary leaders, its "radical populists" (Collier and Collier 1991), who consolidated their legitimacy and authority by nationalizing the oil industry in 1938. The historical record reveals that U.S. corporations fought this decision bitterly and that they and the U.S. government saw Mexico's move as an ominous harbinger of future threats to U.S. corporate interests in the region (Santiago 2006). Similarly, when we denounce leaders as populist, we inadvertently validate the Democratic Party in the South, whose leaders "reserved their harshest words and deeds for African Americans, ... within the electoral rebellion" (Ali 2010:116) and the white-majority at the 1896 People's Party nominating convention, who backed the Democratic Party's presidential candidate over the objections of Black Populists (ibid: 113). Wielding populism as a label, in this ahistorical way, is problematic. It simultaneously trades on the way history validates the perspective of the winners (those who either vanquished or coopted populist movements) and erases any criticisms of capitalism or capitalists that they, like their predecessors, may have.

A world-systems analysis, instead, directs us to more explicitly examine how recent instances of "populists" are part of a longer concrete history of seemingly similar political processes. This directive can be traced to Terry Hopkins' call for reconceiving historical events, be they revolutions or the rise of fascism, as processes which must be studied as part of a single "cumulating process" (Hopkins 1978). He reasoned that we should not analyze the conditions of any given regime type as if such conditions could be transplanted across time and space, because to do so would "deny a central feature of what we are trying to study"—namely that we live in a "multi-level, complex system of social action that is comprehensive and singular ... and so forms ... a temporal 'world' with its own irreversible sequences and nonarbitrary periodicities" (Hopkins

1978: 204). Thus, he argued any apparent case of a particular phenomenon is better conceived of as an instance of a longer, concrete history. Understanding recent “instances” of such a process should entail, in his view, contemplating how it is nested in a longer “cumulating process” of such a phenomenon.

In many parts of the world, such a “cumulative” historical approach would mean grappling with how today’s “populists” are themselves reactions to the legacies of their nation’s earlier formative populist projects, as they were in much of Latin America. Indeed, Chávez trounced a political establishment itself crafted, first in 1945-48 and more definitively in 1958, by leaders that most define as populists. Moreover, he did so by appealing to a public’s growing sense that capitalists, including the still-powerful foreign oil companies, had corrupted their political establishment (Gates 2010) much as formative populists had done. Such an analysis would not just take into consideration the structural limitations of resource nationalism, it would also contemplate the relationship of Chávez’ project to the particularities of Venezuela’s formative populist project. It would entail analyzing not just what went wrong with Venezuela’s formative populist project, but also how the formative instance of populism may have been particularly vulnerable to opponents like Chávez, who re-imagined their nation’s “populist” project in the neoliberal era. Even as it would be difficult to understand populism without world-systems analysis, “populists” pose valuable puzzles for world-systems analysis.

## **Part II: Why Populism Poses Valuable Puzzles for World-Systems Analysis**

World-systems scholars should pay attention to so-called populists today because their varied economic projects pose intriguing puzzles for world-systems analysis. Taking up such puzzles presents an opportunity to advance world-systems analysis and refine our understanding of the relationship between politics and the dynamics of the capitalist world-economy.

### **The puzzle of populism’s varied economic projects**

World-systems analysts have not wrestled with populism’s varied economic projects. This is unfortunate, given that the divergent economic projects of so-called populist regimes today pose important puzzles for at least two of the aforementioned ways that world-systems analysis might interpret populism.

“Populists” who do not reject the core principles of the neoliberal economic project pose a challenge to those who might interpret populism as a backlash to the recent neoliberal transformation of the capitalist world-economy. The Philippines President Rodrigo Duterte (elected in May 2016) is a case in point. Despite initially appointing members of his nation’s communist party to his cabinet and cozying up to China, Duterte has largely abandoned campaign promises to curb unfettered mining by foreign capitalists and to limit contract labor (Bello 2018: 52). Indeed, Duterte’s regime has de-facto allied with the “landed class, big monopoly capitalist

actors...and Big Mining” (ibid). He has also enabled the Philippine’s oligopolistic national elites to bypass inter-state relations and absorb new Chinese investment (Camba 2018, 2017). Similarly, Turkey’s president Recep Tayyip Erdogan (2002-present) hewed closely to the proscriptions of International Financial Institutions, including the IMF, and Turkey’s neoliberal technocracy, even as the government proclaimed itself the ally of Turkey’s Muslim-identified national business community. Thus Bello’s characterization of Duterte as a “*right-wing* backlash against the liberal democratic establishment” (Bello 2018: 50) might be equally appropriate for Turkey’s Erdogan, albeit with the added backlash against liberal democracy’s identification with secularism.

Similarly, the varied economic projects of populism across the semiperiphery pose a challenge to those who would interpret populism as rooted in that particular structural position within an international division of labor. Erdogan and Duterte’s nationalist, but de-facto neoliberal, projects bear little resemblance to the developmental states fashioned by the formative instances of populism that arose in the semiperiphery in the early 20<sup>th</sup> century. Erdogan and Duterte’s projects also contrast starkly with a trio of Latin America’s recent “populists”: Venezuela’s Chávez, Bolivia’s Morales and Ecuador’s Correa. The latter three helmed “multiclass alliances” in support of economic policies that favor “diversified commercial and technological relations” (Ellner 2012: 97). Unlike their “center-left” counterparts in Latin America, these leaders of “the new left” (Harnecker 2010: 35-50) advanced Chávez’s “twenty-first-century socialism” through a “new international movement...of radical change” (Ellner 2012: 96). They promoted “a new narrative of nationhood” defined as “anticapitalist” in opposition to Washington. Hence they favored “close ties with neighboring center-left governments...to resolve political disputes [in ways] that exclude the United States” (ibid: 96, 104).

A closer look at the formative instances of populism in the early 20<sup>th</sup> century within the semiperiphery further reveals important variation. For example, Venezuela’s formative populism differed markedly from that of Mexico’s. Venezuela’s initial populists eschewed nationalizing their treasured oil industry in their initial attempt to govern (1945-48) even though Mexican populists consolidated their authority in 1938 by nationalizing oil. Neither did they revert to nationalization when they deposed the dictator who had dethroned them in 1958 and formed what would become one of Latin America’s celebrated democracies, one which endured until 1998. Why do populists across the semiperiphery take up such distinct economic projects at similar historical junctures?

Such variations in the economic projects of so-called populists underscore the problem with lumping leaders like Trump and Chavez together under the category of populism. Doing so obscures real differences in the likely social bases of the regimes and how these regimes seek to relate to world markets. Populism’s varied economic projects also make the system-level



interpretations of world-systems analysis unsatisfying. Ironically, there is within world-systems analysis the seed for how to unravel such puzzles.

### **The promise of advancing world-systems analysis through populism's puzzles**

World-systems analysts have devised a logic of comparison, which could unravel the puzzle of populism's varied economic projects. This logic, worked out by McMichael (1990) and Tomich (1994), echoes Hopkins' call for concrete historical analysis. They call for incorporating the comparison into the substance of the analysis. They also articulate the value of a particular form of comparison implicit in Hopkins' earlier notion of "cumulating processes" when they call for describing "the specific relationships and processes that make the system by way of comparing its parts" (Tomich 2018: 157). Doing so "establishes spacio-temporal differences in apparently similar processes" (Tomich 2018: 157). Such a comparison thus considers the sequence of instances within a process as an essential element of the substantive analyses, recognizing that earlier iterations have the potential to reshape the very nature of the whole in which subsequent iterations occur. It also has the potential to reveal how apparent spacio-temporal differences are in fact constructed through a dynamic, and mutually constitutive, relationship of seemingly separate parts within the wider whole of the capitalist world-economy. World-systems analysts have yet to fully explore the promise of such 'incorporated comparisons' for unraveling the puzzles of populism's varied economic projects. Those that do, should take inspiration from C.L.R. James.

C.L.R. James' path breaking analysis of the Haitian revolution (1791-1804) offers a model of how to conduct such a relational comparison of two apparently autonomous, but coterminous, instances of the same political phenomenon. James probes how the unraveling of France's rule in its most prized colony had roots not just in the hot and bloody plantations of the island, but also in France's own revolution starting in 1789. His analysis reveals how the failures of mulattos and white planters to secure allies in France's revolution inflamed tensions in the colony and fractured an already tenuous alliance of whites. This process created an opening for those willing to mobilize the slaves, including Toussaint. James also challenges received wisdom of France's own revolution; establishing how the "slave trade and slavery were the economic basis of the French Revolution" (James 1989: 47-48). James' analysis demonstrates the analytic gain when we examine political processes as part of "an overall developmental movement carried forward by one major form of the process, then a second one, with the first still going on, then a third form, all intersecting, and so on" (Hopkins 1978: 204). It reveals why it is implausible to think that the first, or any earlier, iteration of populism would have no bearing on subsequent iterations. Earlier iterations necessarily impact subsequent iterations in part because they necessarily impinge on the nature of global markets within which subsequent iterations take place, and in part because the

way an earlier transformation is framed can shape how key actors of subsequent instances strategize and frame their struggle.

This mode of analyzing comparisons relationally suggests we should contemplate how Trump and Chávez emerged within a particular sequence of similar political processes. This is not the same thing as assuming that later iterations mimic earlier ones, as Meyer's world-society school might envision. Just as Venezuela's early populists did not mimic Mexico's nationalization of oil, Trump should not be interpreted as mimicking Chávez. Instead, it means that we should contemplate how each successive iteration may re-shape the very nature of the capitalist world-system within which subsequent iterations emerge. Were we to take up this methodology of relational comparisons, we might then delve into how Trump's rise may, in fact, be related to the earlier wave of Latin America's "New Left." We might ask: What were the material consequences of Latin America's earlier populist wave kicked off by Chávez for the structure and dynamics of capitalism and America's place within it? To what extent did it contribute to the crisis of U.S. hegemony and erode economic dominance in ways that disadvantaged those who would support Trump? This line of questioning would contemplate how political agents for change in the Global South re-configured the very structure and dynamics of capitalism, laying the groundwork for popular sympathy to coalesce around an anti-establishment candidate like Trump in the United States. How did the swift condemnation and frequent mis-representation of Chávez and Latin America's "New Left," even from the *New York Times* and an Obama-led White-House, prime the pump to dismiss Trump as a populist? Did smearing Trump as a populist appeal to the pundits of the *New York Times* in part because the paper had just discredited Latin America's "New Left" as populist demagogues? We might even contemplate how Trump's frequent bashing of Mexico may have fueled the popularity of Mexico's "New Left" presidential candidate, López Obrador in Mexico's 2018 presidential elections. Similarly, we might contemplate whether the now common denunciation of Trump as a populist by *New York Times* pundits, has itself set the stage for discrediting Mexico's new president, López Obrador, as a "populist" (Kelly 2018).

These are among the promising lines of inquiry, that a methodology of relational comparisons could take up. Such a methodology has the potential to illuminate facets of political life that we would otherwise leave unexplained and, thereby, advance world-systems analysis.

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