

NATIONS WITHOUT STATES

Class, Society and Geography in the World-System

SAMUEL PARRY



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in the World-System

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*To Najima and my world-system;
it is a pleasure to be a part of our whole.*

*Also dedicated to the memory of
Fernand Braudel and Immanuel Wallerstein.*

Everything must be recaptured and relocated in the general framework of history, so that despite the difficulties, the fundamental paradoxes and contradictions, we may respect the unity of history which is also the unity of life.

Fernand Braudel

*Between my finger and my thumb
The squat pen rests.
I'll dig with it.*

Seamus Heaney

PREFACE

Be patient toward all that is unsolved in your heart and try to love the questions themselves, like locked rooms and like books that are now written in a very foreign tongue. Do not now seek the answers, which cannot be given to you because you would not be able to live them. And the point is, to live everything. Live the questions now. Perhaps you will then gradually, without noticing it, live along some distant day into the answer.

Rainer Maria Rilke

This book is the culmination of more than half a decade of scholarly activity. It developed from a PhD thesis, though its scope and ambition have since grown considerably. My original aim was more modest, though no less difficult: I wanted to understand the political economy of Wales. Looking at my surroundings, I could not help but ask why Wales remained poor in relative terms compared to its neighbours both within the British Isles and across western Europe.

The research began in a fairly orthodox manner. I examined Welsh economic policy, the workings of the European Union, and the relationship between Wales and the British state. Yet these investigations offered only partial answers. While economic mismanagement by elites in Cardiff and London had certainly reinforced Wales's economic marginality, it quickly became clear that this was more a symptom than the primary cause. Contemporary policy could not fully explain how this position had come to be. It became apparent to me that the deeper answers lay elsewhere.

I came to realise that by looking only at the present, I was limiting my field of enquiry and that my frame of reference was incomplete. Understanding the Welsh economy today required

understanding Blair and devolution. Understanding Blair required understanding Thatcher. Understanding Thatcher required grappling with the collapse of the post-war consensus. That, in turn, led back to industrial transformation and the rise of nationalism in the nineteenth century. Like a series of dominoes, each historical *conjoncture* was intimately linked to those that preceded it. This was not to say that the past determined the future in some mechanical way. Agency still mattered. However, what came before conditioned what could come next. The next domino could only be placed in certain ways.

This led me to wonder how far back this process could be extended. At no point was what we now call Wales a blank canvas. Yes, it was once uninhabited, but the first humans did not enter a garden of Eden. They arrived in a specific ecological zone with material constraints and possibilities and had to define themselves within them. I became convinced of the need to ground my analysis in real places; real zones where humanity is understood as part of nature. While Enlightenment thinking separated ‘nature’ from ‘society’ – casting the former as an object to be conquered – I argue that this division is illusory. Humanity and nature are part of a single web of life. The fact that we have forgotten this is, perhaps, among the greatest causes of today’s ecological catastrophe.

I do not remember how I first encountered the Annales School or the concept of the *longue durée*, but its influence was transformative. Human geography at times felt overly deterministic, with no space left for human agency. Meanwhile, orthodox history tended to treat geography as mere backdrop. The *longue durée* bridged these extremes. Geography became more than a backdrop, it was an actor in its own right. Yet this did not downplay the creativity and agency of human societies. In fact, the opposite. The insistence that social possibilities are historically and geographically contingent elevates human ingenuity. Forms of material life where societies have found ways to adapt to their surroundings echo through history. It is far harder to leave your mark on a canvas already painted than on one that is blank.

A second methodological question soon emerged: how could the political economy of Wales be situated within wider structures and narratives? I have been, for as long as I can remember, a Marxist. Concepts such as class conflict and economic exploitation have always seemed to me fundamental. I was drawn to Dependency Theory and the idea of a core-periphery divide, no doubt influenced by Michael Hechter's internal colonialism thesis. England became an obvious and easy foil for comparison with Wales. But some books stay with you precisely because you disagree with them. I could never fully accept Hechter's simplistic binary of an oppressed Celtic fringe and a monolithic, near cartoonishly evil England. Scotland's experience did not mirror that of Wales, and neither aligned perfectly with Ireland's. Northern England, which in many ways resembles Wales more closely than any of the Celtic nations, was conveniently ignored. Nor could the internal colonialism thesis explain the scale and dynamism of Welsh industrial development. It became clear that I could not understand the political economy of Wales without embedding it within much wider systems. Yes, Welsh industrialisation was tied to Britain's rise, but it was also tied to developments in the United States, in West Africa and in the Caribbean. Relations were not simply bilateral, but multilateral. Wales had to be conceptually placed within a global, not merely British, framework.

World-systems analysis in general, and the work of Immanuel Wallerstein in particular, seemed especially well suited to this task. It built upon the Marxist and dependency traditions, retaining their focus on class and structural inequality, while also globalising the unit of analysis. It offered a powerful framework for understanding historical change. Yet, even here, there were limits. While world-systems analysis shifted the unit of *analysis* from the state to the world-system, the unit of *observation* remained largely statist. 'Britain' came to mean the south-east of England; 'France' meant Paris. This is to an extent understandable, but as someone who experiences the world-system from a stateless nation – far from the centre of the state – I saw no reason why Wales and other places like it could not be the unit of observation.

By this point, my aim had shifted. I now sought to say something about changes in the world-system *through* the lens of Wales. But one case study alone could only say so much. To discern general patterns, I would need multiple observation points in both space and time. Comparing different stateless nations allowed for broader insights while also deepening the analysis of Wales. There is an understanding here that Wales is my home ground. The historian understands almost instinctively the twists and turns of his own country. ‘Never can he enjoy the same advantages, however great his learning, when he pitches camp elsewhere’ (Braudel, 1993, p. xvi). I do hope I have managed to do justice not only to Wales, but also to the other case studies. Yet the possibility that I have missed a crucial moment that I am not intimately aware of unfortunately remains.

Choosing the other cases was guided by both academic logic and personal interest. Scotland, though an obvious candidate due to its shared state, did not appeal to me. It has already been extensively studied, and its inclusion risked reinforcing the tendency to treat Wales as an appendage to its larger neighbour. I wanted Wales to stand on its own terms. Catalonia, by contrast, struck me as a compelling choice; a historic nation that, despite its cultural and economic weight, had lost statehood and is yet to attain it in the modern era. Yet my aim was never to take sides in the independence debate. I wanted to analyse the political economy of Catalonia as I saw it, without ulterior motives or hidden agendas. My final case was the north–south divide in Italy: Padania and the Mezzogiorno. I felt a strong affinity with the Mezzogiorno which is often seen – like Wales – as backward, poor and peripheral. It, too, has often been used to tell someone else’s story. The land of the midday sun deserves a place in the spotlight. Padania, on the other hand, fascinated me for its absurdity. For centuries, the Italian peninsula was defined by its resistance to political union. Yet today, some actors attempt to fashion a unified ‘Padanian’ identity from the legacies of Genoa, Venice and Florence, amongst others. In many ways, it resembles the opposite of Catalonia or Wales: rather than being a nation that has

been in dialectical confrontation with its central state over centuries, it is a 'nation' that is being constructed before our very eyes.

Many other stateless nations could have been included in this analysis. I am aware that my case studies are all European, and there is certainly scope to extend this project beyond the continent. But I was wary of trying to say too much and therefore saying nothing at all (perhaps that danger still remains). Non-European nations – whether stateless or not – often carry the burden of European colonialism. This shaped and affected state forms in wholly unnatural ways. How would we therefore undertake this task? Would we equate tribes, clans or ethnic groups with nations? How would we define which nations are stateless? To impose European historical categories onto non-European societies risks distorting their histories, which are deserving of their own attention. This is an endeavour that, for now, lies beyond my own expertise, though it is one I hope others will take up. Within Europe, there are many other worthy cases: Corsica, Flanders, Wallonia, the Basque Country, Languedoc, Brittany amongst others. All would have added value. Each would have added a new vantage point. But for the time being I have aimed to strike a balance between breadth and depth. Who knows, perhaps this will become a larger project in future.

To conclude the preface, I would like to thank those whose academic contributions shaped this book. Huw Williams offered invaluable guidance during my PhD and always humanised that which at times was overly economic and mechanical. Neil Evans was always available for discussion and read an early version of the manuscript. He is a historian and scholar that I hold in the highest esteem, so to have his support and guidance meant more than he will ever know. Rhys Jones provided both generous feedback as my external examiner and further advice in the book's development. I owe special thanks to Calvin Jones, my PhD supervisor, without whose support this project would not exist. Both of us, at times, are seen as unorthodox in the small academic circles of Wales. Having someone that had trust in my ability and nurtured my conviction was so very important.

A particular and heartfelt thanks is owed to Jason W. Moore. His comments on an earlier draft were transformative. He rightly observed that the manuscript still read like a PhD thesis: its arguments were tentative, my voice uncertain, and the narrative had to be teased out rather than it being explicit. I spent almost nine months working through his suggestions and this book is far the stronger for it. Jason was a critical friend throughout. He helped me to clarify the aims of the project when they seemed uncertain to me. I had fallen into the trap of trying to say and do too much, which left the work bloated and without purpose. At times when I was too close to see the wood for the trees, he offered perspective. He reminded me of the importance of self-criticism in writing. I remember him telling me that self-criticism creates the *possibility* for great work. Whether I have achieved that, I do not know. Nor is it for me to decide. But I am deeply grateful that he gave me the chance to try.

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INTRODUCTION

L'histoire; science du passé, science du présent.

Lucien Febvre

History is a weapon in the ideological battle between those who want to change society and those who want to maintain its basic features. I do not believe the pronouncements of those who claim to be above the fray, because people make history, albeit within objectively determined conditions.

Samir Amin

At the heart of this book lies a seeming contradiction. Europe is viewed as the cradle of the nation-state, yet within the territorial borders of some of its most consolidated and long-established states lie nations whose incorporation remain partial and incomplete. The state has been unable to flatten the cultural differences that exist between its different constituent parts. Economic roles remain sharply differentiated, while reference to their histories of incorporation still generate material, institutional and ideological tensions. These are stateless nations whose integration into modern state structures are yet to resolve the contradictions of uneven economic development.

This unevenness is not a historical accident, but the outcome of a broader logic. Each state is part of a world-system that requires spatial differentiation. Politics is a tool which is used to manage this unevenness. To analyse this tension between unity and diversity and the unevenness of economic outcomes, Wales, Catalonia, the Mezzogiorno and Padania are presented as units of observation. Each unit has followed its own historical trajectory and each occupies a distinct structural role. One is a productive centre with limited

institutional power; another is a periphery maintained through value-transfers in a traditional form of dependency; one generates surplus and demands its retention; while one has seen its productive base eroded and replaced by managed redistributive decline. What unites them as units of observation is that each reveals how uneven development is maintained, administered and obscured within the nation-state and through the world-system.

These places are loosely defined as stateless nations albeit some have much longer claims of cultural authenticity or linguistic difference. Despite this reality, each is a constituted territorial unit whose relationship to sovereignty and political economy has been shaped by their structural position within both the state and the world-system. The purpose is not to view them as failures of political modernisation or as primordial relics, but to understand that their realities and economic positions are contingent on wider systems. Functionally, each has been assigned an economic and political role, and each has been incorporated on terms that reflect this role.

As Samir Amin (2010, p. 84) wrote, ‘capitalism is not the United States and Germany, with India and Ethiopia only “halfway” capitalist. Capitalism is the United States and India, Germany and Ethiopia, taken together.’ To this we might add: capitalism is not only Germany, but also Munich and Gelsenkirchen; not only the United States, but New York and Detroit; not only the United Kingdom, but London and Blaenau Gwent; not only Italy, but Milan and Bari. If we are to understand the reproduction of uneven development under capitalism, we must treat differentiation not only as a phenomenon *between* states, but also as one *within* states.

The aim of this book is to understand how such differentiation emerges and endures. It does so not by comparing stateless nations as autonomous units, but by analysing them relationally within a wider system: the world-system. It treats their autonomy, dependency, productivity and stagnation as historical outcomes of their integration into world-systemic imperatives and its consequence on state structures, rather than as inherent traits. Their political

struggles emerge not only (or mainly) from identity, but from the inherent unevenness of the capitalist world-system.

I argue that the world-system does not simply divide states into cores and peripheries, but also creates differentiation within them. Roles are assigned and institutional frameworks are created and designed to manage those divisions. The result is that states are stitched together from a patchwork of regions with structurally distinct functions, levels of control and access to power. What emerges is a contradiction between unity and diversity. The state wishes for *political* unity, while *economic* differentiation remains central to the functioning of both the state and the wider system. In this regard, the very system reproduces the structural tensions that exists between regions.

This book rejects methodological nationalism. It does not assume that nations or regions are self-contained entities whose development can be analysed in isolation. Nor does it treat the nation-state as the natural unit of political economy or historical narrative. Instead, it begins from the premise that all regions are relationally constituted. As Marc Bloch (1992, p. 35) argued in *The Historian's Craft*, 'there is no true understanding without a certain range of comparison; provided, of course, that the comparison is based upon differing and, at the same time, related realities'. The point is not to seek sameness, but to identify the processes that produce specificity; how different configurations of power, space and economy generate different regional outcomes. 'The beauty of the world-system approach is that it gives you different directions and assumptions. What is important is the different. Do not try to invent the sameness' (Tomich, 2012).

This perspective requires a historical method capable of tracing how regions become differently produced. For this reason, the book adopts a *longue durée* approach. The conditions of the present cannot be understood without tracing the processes by which they were constructed. Wales did not suddenly become a dependent polity after deindustrialisation: it was structurally subordinated through centuries of administrative centralisation and resource extraction.

Similarly, Catalonia's political frustrations cannot be explained away solely by recent events, it instead reflects a long history of inclination and aversion to the Spanish state, contingent on the position of both in the world-system. The Mezzogiorno's persistent underdevelopment was deepened over centuries of conquest while Padania's rightward populist turn is rooted in the conditions of state formation and its differing position from the south over centuries.

Today's realities are the result of historical processes that have shaped how space is governed and capital is accumulated over time. Understanding this central fact and being able to create connections between seemingly disparate processes requires a specific historiographical lens. The structures that shape regional difference cut across what we too often keep separate: political economy, state formation, territorial governance and the lived histories of specific places. Yet the human sciences, as Fernand Braudel (1982, p. 55) noted, have tended toward 'long-standing, confirmed, fundamental, indeed almost structural diversity'. Each discipline has claimed its own terrain, its own methods, its own scale. Let us assume, as Braudel suggested, 'that all human sciences are interested in one and the same landscape: that of the past, present, and future actions of man. Unhappily, the sections of landscape which each has cut out do not join together, like the pieces of a child's puzzle.' This book is an attempt to reassemble some of those pieces. It treats the economy not as a separate sphere of human activity, but as something embedded in space, organised through political institutions and reproduced across time. It refuses to isolate economics from the wider structures in which we live. If the world we inhabit seems fragmented, it is not because the processes shaping it are disconnected, but because the ways we study them – through disciplines, categories and silos – have made them so.

As in Plato's allegory, much of academic thought lives in the cave of its own making. Economists abstract the economy from society. Political scientists isolate institutions from space. Historians often remain captive to national frames. In the pursuit of expertise, we have constructed intellectual enclosures that obscure the interdependence

of the processes we seek to explain. This book resists that enclosure. It approaches the economy as a mode of existence that shapes and is shaped by social life, political form and geography.

The usage of these case studies should not be understood as solely giving a 'national history' to these places, but instead they are used to illuminate and explain changes in the world-system. To this end, they are regional configurations of the capitalist world-economy; they are sites where the contradictions of capitalist statehood become most visible. Their analysis matters, not because they diverge from the norm but because they reveal the norm that capitalist modernity produces internal differentiation.

The breadth of time covered here reflects a commitment to structural analysis over event-driven narrative. The tenacious persistence of the past makes it difficult to cut a segment of time from that which preceded it. The aim is not to chronicle each region exhaustively, but to trace the longer-term processes that have shaped their role within the world-system. A narrower focus might yield greater empirical density, but would risk mistaking effects for causes. A historical view allows us to understand how regions become what they are through the long-term cycles of conquest, accumulation, crisis and restructuring. This does not mean that outcomes are predetermined. 'The paths of state formation were multiple but not infinite, at any particular historical juncture several distinctly different futures were possible' (Tilly, 1992, p. 33). History is not the sum of inevitabilities, but of dismantled almos. It is, as Sylvia Plath wrote, like a fig tree: each branch bearing a fat, purple fig and each fig a possible future. One future winks and beckons while the others wither. Yet to study history is not only to describe the fruit that was chosen, but to understand the tree and the structure that made each outcome possible.

This book does not offer a single theory of state failure, it does not claim that autonomy would inherently resolve the contradictions it describes, nor does it presume that all nationalist claims are progressive. What it offers is a structural diagnosis and that stateless nations are not exceptions to national unity. They are constitutive

elements of a system that depends upon internal difference. The purpose, then, is not to write the history of Wales, Catalonia or the Mezzogiorno in isolation. As Bisson (1991, p. 3) cautioned, ‘to write of one land is necessarily to write of all, and so, perhaps, to do less justice to any’. But that, in a sense, is the point. No region can be fully understood on its own terms, not because its history is unimportant, but because it is structurally part of one web of life. This is what world-systems analysis allows us to see: that every region is both itself and more than itself, that it is defined not only by its own characteristics but by its position in a wider field of relations. The histories that follow are not footnotes, but vantage points from which to see the structure of the very system itself.

1

THEORETICAL UNDERPINNINGS

Social reality is ephemeral. It exists in the present and disappears as it moves into the past. The past can only be told as it truly is, not was. For recounting the past is a social act of the present done by men of the present and affecting the social system of the present.

Immanuel Wallerstein

And now it is all gone – like an unsubstantial pageant faded; and between us and the old English there lies a gulf of mystery which the prose of the historian will never adequately bridge. They cannot come to us, and our imagination can but feebly penetrate to them. Only among the aisles of the cathedral, only as we gaze upon their silent figures sleeping on their tombs, some faint conceptions float before us of what these men were when they were alive; and perhaps in the sound of church bells, that peculiar creation of medieval age, which falls upon the ear like the echo of a vanished world.

James Froude

Before delving into the weeds of our case studies, it is essential to establish a theoretical foundation. The epistemological underpinnings of this work must be elucidated, as they shape the narrative framework through which this story is told. Recounting the past, as Wallerstein and Froude remind us, is a social act of the present done by people of the present. It is therefore imperative to reflect on why and how we choose to narrate history in a particular way; every historian makes deliberate decisions about which events are deemed significant and how these events are contextualised

within broader historical currents. For instance, can we truly understand the Acts of Union of 1536 without considering the longer history of Norman and Anglo-Saxon conquest? Can we grasp the nature of those conquests without examining the deeper historical and geographical forces that are etched in our mountains and flowing through our streams? I argue that we cannot. The present is an accumulation of the past, and 1536, too, was once the present, shaped by the historical currents that preceded it.

Just as we cannot fully comprehend historical events without situating them within wider currents, we cannot understand historiographies without examining the intellectual and material conditions that produced them. Historiography is a battleground where competing modes of thought and material interests clash. These modes of thought do not emerge in isolation; rather, they are deeply influenced by what has come before, seeking to prove, disprove, dislodge or overcome earlier interpretations. History and historiography are not value-neutral endeavours: they are shaped by the perspectives and priorities of those who write them, as well as the socio-political contexts in which they are produced.

To this end, I aim to outline the economic and historical orthodoxies that prevailed before the emergence of world-systems analysis and the Annales School. By doing so, I will demonstrate how these earlier paradigms shaped our understanding of political economy, economic history and history more broadly. This exploration will highlight the limitations of these orthodoxies and set the stage for understanding how world-systems analysis and the Annales School sought to challenge and transcend them. In doing so, we can better appreciate the ways in which historical narratives are constructed, contested and reconfigured over time.

Dependency Theory and the stagist view of development

How, for example, should the traditional society react to the intrusion of a more advanced power: with cohesion, promptness, and vigour,

like the Japanese; by making a virtue of fecklessness, like the oppressed Irish of the eighteenth century; by slowly and reluctantly altering the traditional society, like the Chinese?

Walt Rostow

During the 1950s and 1960s, Modernisation Theory emerged as the dominant paradigm within development economics. This theory posited that as countries became wealthier, more educated and economically ‘modernised’, their institutions would inevitably evolve into liberal democracies. Rooted in an evolutionary view of development, Modernisation Theory argued that all nations must pass through a series of stages to move from poverty to wealth, from ‘backwardness’ to modernity. These stages were modelled after Britain’s development path, which was seen as the ideal template due to its status as the pre-eminent industrial power (Rostow, 1959; Parsons, 1964; Almond and Coleman, 1960).¹ Proponents of the theory believed that by emulating Britain’s trajectory, other nations could achieve similar levels of prosperity and development.

Some, of course, started their ascents earlier than others, thereby showing the way to late-starters; and some proceeded at times more rapidly than others, suffering accordingly from forcing historical change. But they all trace broadly parallel lines of development in a quadrant having level of development for its y-axis and historical time for its x-axis. (Hopkins and Wallerstein, 2016, p. 83)

Emerging from the geopolitical tensions of the Cold War, Modernisation Theory was not merely an academic framework but also a tool of US foreign policy. Theorists like Walt Rostow viewed the stagist model as a weapon against the spread of communism. By providing economic aid to countries in the Global South, the United States aimed to push them toward the ‘take-off’ stage of development, creating new liberal democracies that would counterbalance Soviet influence. This approach, however, rested on the assumption that

1 These authors continually conflate ‘Britain’ and ‘England’.

states were mechanically and structurally independent entities. Development was reduced to a technical problem: a little more industrialisation here, a slight adjustment to agricultural practices there, and every nation would eventually modernise in the same way Britain had. This perspective ignored the complex historical, social, and global forces that shape development, treating states as if they existed in a vacuum.

At its core, Modernisation Theory argued that the conditions for development were largely dependent on endogenous factors, with each country representing a separate system of economic production. This framework implied that ‘uneven economic and hence social outcomes are somehow “natural”’ (Jones, 2015, pp. 274–5). In other words, if countries failed to ‘catch up’ with Britain and other Western powers, the fault lay not with the structure of the world-economy but with their inability to adopt the ‘correct’ policies.

Modernisation theorists may claim that today’s underdeveloped countries are simply at an imperfect and earlier stage on the path towards the British ideal, but this seems like a particularly onerous suggestion. States are not vivaria where development can be observed independent of external influences. The historical context of Britain’s ‘take-off’ – its colonial exploitation, its dominant position in the global economy and its relationship with other states – was fundamentally different to the conditions faced by today’s underdeveloped nations. To suggest that these nations can follow the same path is not only ahistorical but also dismissive of the structural barriers imposed by the global economic system.

Moreover, by treating the state as the primary unit of analysis, Modernisation Theory inherently obfuscates the significant regional differences that exists within it. Wales developed differently from England, and southern England developed differently from northern England. How, therefore, should we categorise the developmental level of Britain? Is it based on that of London or Leeds? Surrey or Swansea? By analysing the development path of Britain, France or Spain in the aggregate, the regional differences within the state – and the differing historical, geographical and

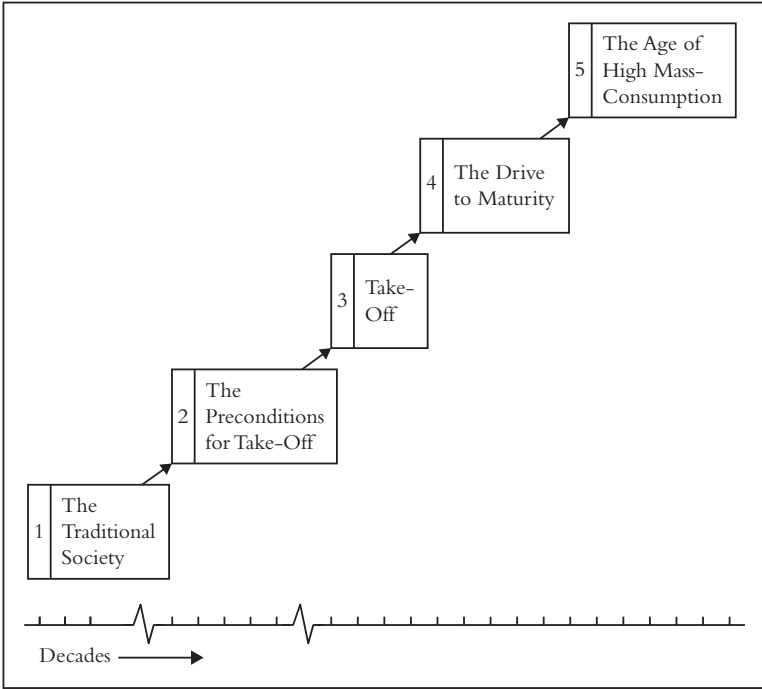


Figure 1: The Rostow Model (Binns, 1995, p. 305).

political forces that shaped development differently across regions – are obscured. States, therefore, are not necessarily the correct unit of analysis.

Dependency Theory

The net effect of the rise of European capitalism was therefore to intensify uneven development, and to divide the world ever more sharply into two sectors; the ‘developed’ and the ‘underdeveloped’ countries, in other words the exploiting and the exploited. The triumph of capitalism at the end of the 18th Century put the seal on this development. Capitalism, while no doubt providing the historic conditions for economic transformation everywhere, in fact made it more difficult than before for the countries which did

not belong to the original nucleus of capitalist development or its immediate neighbours.

Eric Hobsbawm

Dependency theorists observed that inequality between states in the international system remained persistently entrenched. They argued that Modernisation Theory failed to explain the lack of convergence in developmental levels between poor and rich states. Instead, they posited that the world was divided between developed and underdeveloped countries, or a core and periphery. Emerging as a direct critique of Modernisation Theory's stagist understanding of development, Dependency Theory was born out of and for the periphery. Latin America – particularly Chile – became a nucleus for this intellectual tradition. The Centro de Estudios Socio-Económicos (CESO) at the University of Chile was at the heart of this movement, hosting prominent academics such as Andre Gunder Frank, Theotonio dos Santos, Ruy Marini, Eric Hobsbawm, Alan Touraine, Paul Sweezy and Fernando Henrique Cardoso during its short six-year tenure.

Dependency theorists argued that the relationship between the core and periphery of the international system is inherently exploitative, with surplus value transferred from the periphery to the core. This value transfer provides disproportionate funds for further mechanisation and production in core countries, enabling them to gain competitive advantages in existing industries while developing newer products, thus perpetuating the cycle (Clelland, 2012, pp. 199–200). This reality led Andre Gunder Frank (1966) to coin the term 'the development of underdevelopment'. He argued that – contrary to Modernisation Theory's claims – the lack of development in the periphery is not a residual hangover from a late starting point. These regions are no less 'modern' than their core counterparts; rather, their underdevelopment represents a specific form of development shaped by 'exploitation, structural distortion, and suppression of autonomous policies' (Chase-Dunn, 1975, p. 722). Importantly, underdevelopment differs from being undeveloped;

while core countries may have once been undeveloped, they were never underdeveloped.

Distorted development

The processes of exploitation and structural distortion that leads to underdevelopment manifest in myriad ways. For instance, foreign investment in the periphery extracts surplus profits and transfers them to the core. Samir Amin (1974a) referred to this process as ‘decapitalisation’, meaning that while indigenous firms might reinvest some of their profits into local economies through improved equipment and productive forces, multinational corporations repatriate their profits to the core. Moreover, the sectors in which multinationals invest are often the most dynamic in the peripheral economy, meaning that profits are extracted from the very areas most likely to offer pathways for development. This locks underdeveloped countries into a specific type of economic activity, stifling their potential for growth.

Due to their inability to develop value-added goods, peripheral countries become overly reliant on primary exports (dos Santos, 1970). This dependence curtails the growth of internal markets and thus perpetuates backward relations of production. In the highly monopolised international market, the prices of raw materials tend to be suppressed, while the prices of industrial goods rise. This problem is exacerbated by the ability of core countries to produce synthetic alternatives to raw materials such as dyes, fibres, petrochemical-based synthetics like polyvinyl and polyester, and synthetic rubbers (Muthu and Gardetti, 2020; Swift, 1998; Thirlwall and Bergevin, 1985). Additionally, raw material prices are volatile and more prone to fluctuations compared to processed or finished goods. As a result, long-term, rational government planning becomes difficult, with no guarantee that income will remain stable or increase. This dependency on core countries for advanced technologies and value-added products further strains the balance of trade of peripheral countries.

Dependency theorists examined the physical manifestations of distorted development. Infrastructure in dependent countries – such as roads, railways and ports – does not follow the same functional logic as in developed countries. Instead, it serves an export-oriented purpose, designed to move raw materials out and value-added goods in. This prevents the integration of internal markets and economies, limiting the capacity for inter-sectoral growth. As Eduardo Galeano (1997, p. 199) observed in relation to Latin America:

the tracks were laid not to connect internal areas one with another, but to connect production centres with ports. The design still resembles the fingers of an open hand: thus railroads, so often hailed as forerunners of progress, were an impediment to the formation and development of an internal market.

The economic structure of dependent states places them in a state of contradiction: they are integrated into the world economy, yet their internal economies remain fragmented and incomplete.

Limitations of Dependency Theory

While Dependency Theory offered a necessary corrective to Modernisation Theory and represented a significant step forward, some of its analytical assumptions were found lacking. First, Dependency Theory maintained that the state was the correct unit of analysis, framing the issue as one of one state oppressing another. This approach paid scant attention to the fact that the state itself is a composite of differing social classes and forces. The core state, in abstraction, was portrayed as the enemy. While the understanding of the relationship between core and periphery advanced the debate, it failed to fully engage with the complexities of the international system. For instance, what of the *comprador* bourgeoisie in peripheral countries, whose interests align with those of elites in the core? Why is it difficult to create class solidarity between the working classes in

peripheral and core countries? Should classes be understood solely in national terms, or are they part of a wider, global dynamic?

World-systems analysis adapted key components of Dependency Theory and expanded them into a truly global framework. At its centre, this approach asserts that to understand the economy of a place, it must first be situated within the broader context of a world-system. World-systems analysis is a holistic methodology that rejects the false dichotomy between internal and external factors. Instead, it emphasises that the processes governing the world-system create the framework within which local decisions are made (Amin, 2010a). This mode of thought is inherently dialectical, meaning that it examines not only the economic structure of a place but also its relationships with other places. In this way, the movements and rhythms of a regional economy are seen as interconnected with, and influenced by, those of other regional economies.

Dependency theorists paid too little attention to these class dynamics, creating a bipartite system that overlooked struggles within countries and the broader interactions of the international system. The issue of Dependency Theory is that it is bilateral in its conceptualisation: it is Wales in relation to England, or Britain in relation to India. World-systems analysis suggests that you must see Wales in relation to England, in relation to India, in relation to France; the relations are polyvariant (Marques and Parron, 2019). Let us take the Acts of Union of 1536 between England and Wales as an example. A bilateral understanding would see the incorporation of Wales into the English state as one solely of power-hungry domination. A multilateral understanding would refer to the weakness of the English state in relation to the core powers of the European continent; namely Spain and France. This weakness was exacerbated by England's loss in the Hundred Years' War and the relinquishing of its continental Empire in France. The incorporation of Wales coincided with efforts to strengthen control over the English peripheries such as Chester, Lancaster and Durham as well as the Pale of Ireland. The English state had to turn internally due to its weakness, offering a new perspective on the Acts of Union.

A central aim of world-systems analysis is to demystify the spatial problematic (Soja and Hadjimichalis, 1979). Physical space, in this view, contains the relations of production and is structured by a territorial division of labour. Social space, on the other hand, is the arena in which class relations and conflicts are produced and reproduced. Thus, space and its production are fundamental to the functioning of capitalism and all social systems. Marx (1970 [1845], p. 245) was acutely aware of the geographic dimension of class relations and conflict, arguing that ‘the foundation of every division of labour that is well developed, and brought about by the exchange of commodities, is the separation between town and country’. A key contention of world-systems analysis is that the unequal development of space is a central feature of capitalism. By introducing the spatial dimensions of capitalism and class relations, this approach provides a more nuanced understanding of global economic dynamics.

Unit of analysis and observation

I was in the process of developing an alternative view of capitalism. In my view, capitalism was the characteristic of a world-system, of the specific variety I called a ‘world-economy.’ Classes were classes of this world-system. State structures existed within this world-system.

Immanuel Wallerstein

We operate on two assumptions. One is that there is no structure that is not historical. In order to understand a structure one must not only know its genesis and its context; one must also assume that its form and its substance are constantly evolving. The second assumption is that no sequence of events in time is structureless, that is, fortuitous. Every event occurs within existing structures, and is affected by its constraints.

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Despite their differences, both Dependency Theory and Modernisation Theory tend to reify the state as their primary unit

of analysis. By treating the state as the fundamental unit, these frameworks assume the existence of independent societies that can be compared using a set of predefined factors and criteria. Historians have long analysed national histories, while economists have studied national economies. But world-systems analysts challenged whether these categories exist independently and whether they are the most useful units of analysis (Wallerstein, 2020, pp. 16–17). Wallerstein's move away from the nation-state as the unit of analysis began with his study of African politics. He argued that the nation-state as a unit is largely a product of colonialism, artificially treating as one entity what had previously been a collection of diverse societies. To impose the concept of nationhood onto African countries was to create discontinuity; a rupture with the past that obscures historical and social realities. The same critique applies to Europe. For example, when did Wales become a nation and thus a valid unit of analysis? Even today, is Wales's economy adequately unified to be used as a unit of analysis? Similarly, where and when do we locate 'Italy' as a nation, as opposed to the Roman Empire, the Florentine city-state or the wilds of Sardinia? Italy, in this sense, is both nowhere and everywhere. By moving away from the nation-state as the unit of analysis, we can better respect the continuity of social, economic and political processes across space and time (Wallerstein, 1961).

A second issue with using the state as the unit of analysis is its inability to fully explain the motivations and ambitions of stateless nations (or specific classes within them) to strive for or against independence and autonomy. Independence movements are rarely driven by a desire for autonomy in isolation; rather, they seek the ability to participate in larger world structures and processes on their own terms. For instance, does the Catalan independence movement aim solely for autonomy from Spain, or does it aspire to engage directly with the European Union and wider geopolitical systems? A world-systems analysis allows for this polyvariant understanding of tensions within and between states. It also reveals how such movements are linked across space and time, waxing and waning in response to changes within the world-system itself. Changes in the

sovereign states can then be explained through the evolution and interaction of the world-system.

The unit of analysis is the economic entity, the one that is measured by the existence of an effective division of labor, and that the relationship of such economic boundaries to political and cultural boundaries is variable, and therefore must be determined by empirical research for each historic case. Further: Once we assume that the unit of analysis is such a 'world-system' and not the 'state' or the 'nation' or the 'people,' then much changes in the outcome of the analysis. Most specifically we shift from a concern with the attributive characteristics of states to concern with the relational characteristics of states. We shift from seeing classes (and status-groups) as groups within a state to seeing them as groups within a world-economy. (Wallerstein, 2011a, p. xi)

The strength of this approach is that it allows us to use the world-system as the unit of analysis while offering stateless nations like Wales, the Mezzogiorno or Catalonia as units of observation. Generally, the nation-state (and therefore) the central locus of power within it is used as the unit of observation, obscuring processes and their effects elsewhere within the state. This work hopes to be a corrective to that mode of thought.

Instead of solely seeking criterion with which to compare these units (which would be necessary if they were our units of analysis), we can examine the processes that create and transform Wales, Catalonia, Padania or the Mezzogiorno, while situating these processes within the broader character of the world-system. Our units of observation are parts of the world-economy; they are components of the world-system. On their own, these parts do not comprise a system. They are not distinct entities that can be studied in isolation. In sum, the whole is more than its parts and cannot be easily reduced to them. It is what Braudel calls *l'ensemble des ensembles* – a set of sets; a bundle of parts assembled into a system. Within this framing, parts do not merely comprise a system; they constitute

it. This means they actively form the system through a host of reciprocally conditioning relationships, both between individual parts and between parts and the whole (Wallerstein, 1976a, p. 345). This framework allows us to observe our units of observation on their own terms within the world-system. We are no longer attempting to compare sameness but to explain difference:

From this perspective, phenomena do not repeat themselves. World economies, cities, markets, etc. are conceived as constituent parts of a more encompassing whole. None is like any other. Each is singular in time and space and in relation to other phenomena. Hence, the basic concepts of historical social science recognize the historical uniqueness of the phenomena under examination. It is a science of the singular. Its object of investigation is a unified, but spatially temporally complex historical whole and the focus of analysis is the formation and reformation of relations through diverse spatial-temporal scales. From this perspective, the assumptions of conventional social science do not obtain. Rather, it is necessary to elaborate new procedures on the basis of different assumptions. (Tomich, 2011, pp. 56–7)

The goal is not to create metrics for comparing units of observation as separate entities but to understand the specific conditions in space and time that shape these units within the world-system. As Andre Gunder Frank (1991) reminds us, such a holistic approach does not negate the need to study the history of individual parts of the system. However, it is essential to recognise that these parts are shaped by, and can only be fully understood in relation to, their participation in the whole and their interactions with other parts. This is the approach I will adopt in treating the units of observation in this work.

The Annales School and the *longue durée*

Is it possible somehow to convey simultaneously both the conspicuous history which holds our attention by its continual and dramatic

changes – and the other, submerged history almost silent and always discreet, virtually unsuspected by its observers or participants, which is little touched by the obstinate erosion of time?

Fernand Braudel

Whilst world-systems analysis borrowed and developed the basic premises of Dependency Theory, it also developed from another tradition: the Annales School and its study of history in the *longue durée*. The Annales School emerged in France during the 1920s, centred around the journal *Annales d'histoire économique et sociale*. Its founders, Marc Bloch and Lucien Febvre, sought to revolutionise the study of history by breaking down the disciplinary barriers that confined historians, economists, geographers and other social scientists into isolated silos. They argued that since social life does not fit neatly into these disciplinary categories, neither should its study. This interdisciplinary approach was one of the Annales School's most significant contributions.

The Annales historians also challenged traditional methods of periodisation, critiquing the overemphasis on the history of events (*l'histoire événementielle*). Instead, they advocated for situating events within the broader context of the *longue durée*; the long-term structures and patterns that shape historical development. Their argument was that historians should look beyond individual events to the underlying structures that influence them. As Marc Bloch (1992, p. 42) observed:

It is easy to see why this remoteness of the scholar from the object of his knowledge makes so strong an impression upon many historical theorists. It is because they think of history primarily in terms of events, even of episodes – of a history which, rightly or wrongly, attaches an extreme importance to the exact reconstruction of the actions, words, or attitudes of a few personages, brought together for a relatively brief scene, in which, as in a classic tragedy, are marshalled all the forces of the critical moment: the day of a revolution, a battle, or a diplomatic interview.

This new approach fundamentally challenged the historiographical assumptions of the past. History is not merely a chronological list of disconnected events. Instead, it is a dynamic interplay of structures, processes and contingencies that shape the present. It asks a fundamental question as to what history *is for*. If the purpose of history is to understand the present, then a perspective which seeks to understand both the parts and the whole, which moves beyond the narrow focus on specific events like battles or diplomatic negotiations, to one which examines the broader social, economic and cultural forces at work is a more useful tool.

History is periodised within this framework into three temporalities. It contains the *longue durée* – the seemingly unmoving – which includes natural environments that are resistant to human intervention such as mountains and seas. There also exists the medium-term – or *conjoncture* – which includes economic cycles, usually measured in decades. The final temporality is the short-term – or the event – which bursts forward. Yet the event holds within it both momentary pressures and longer-term trends (Tomich, 2012). History contains within it plural temporalities, each of which affects the short-term in its own way. As Braudel (2009, p. 182) wrote in explaining the *longue durée* approach:

Whether one is writing about 1558 or the year of Our Lord 1958, if one wants to understand the world, one has to determine the hierarchy of forces, currents, and individual movements, and then put them together to form an overall constellation. Throughout, one must distinguish between long-term movements and momentary pressures, finding the immediate sources of the latter and the long-term thrust of the former. The world of 1558, so bleak in France, was not produced just out of the events of that charmless year. The same is true for this difficult year of 1958 in France. Each ‘current reality’ is the conjoining of movements with different origins and rhythms. The time of today is composed simultaneously of the time of yesterday, of the day before yesterday, and bygone days.

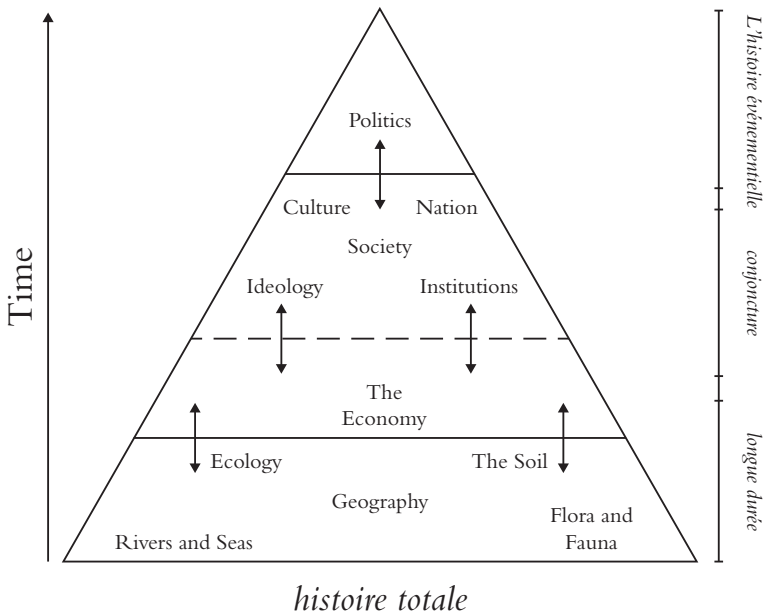


Figure 2: The study of history via a *longue durée* approach (author's own).

The *longue durée*

Should the term of our existence, which is but a moment, be the measure for other durations? Ought we to assert that what has lasted a hundred thousand times longer than we, must last forever? No, ages on ages of our duration would scarcely be any indication of immortality.

Bernard de Fontenelle

Perhaps the most famous historian to employ the *longue durée* approach was Fernand Braudel. His magnum opus, *The Mediterranean and the Mediterranean World in the Age of Philip II*, divided historical time into three distinct layers, with a segment of the book dedicated to each. A brief analysis of these layers can help elucidate the methodological framework of the Annales School. The first part of Braudel's work examines the geography of the Mediterranean world, studying

its hills, mountains, plains, coasts, the Mediterranean Sea itself, and its islands. This geographical time represents the *longue durée*, focusing on the slow, almost imperceptible interactions between the environment and humanity. This long-term history, rooted in geography and the environment, creates the structural framework within which social history and individual events unfold (Tomich, 2011). These structures change very slowly, if at all, and provide the enduring context for human activity. Braudel (2009, pp. 178–9) elaborates on the significance of such structures:

Certain structures, in their long life, become the stable elements of an infinity of generations. They encumber history and restrict it, and hence control its flow. Other structures crumble more quickly. But all structures are simultaneously pillars and obstacles. As obstacles, they provide limitations from which man and his experiences cannot liberate themselves. Think of how difficult it is to break through certain geographical frameworks, certain biological realities, certain limits to productivity, even one or another spiritual constraint. Mental frameworks are also prisons of the *longue durée*.

Let us illustrate this point. For how long have the communities of the Po Valley differed in their social structure from the states of southern Italy that cling to rocky crags by the sea, with the Monti Lattari at their backs? For how long has the call of the Mediterranean resonated in Catalan ears, drawing its gaze eastward to the Côte d’Azur and the islands of the Mediterranean? For how long have the rugged soils of Wales pushed its people toward transhumance, shaping them into agile-footed mountain dwellers? Consider the interplay between geography and the world-system’s need for more materials in the creation of the working class of Wales, who nestled in the mines and pits of the slate, tin and coal industries. Geography endures, and societies endure their geographies; both interact and shape one another in a continuous dialogue through time. As Braudel (1982, p. 3) reminds us, we must remember that the flowers

return each spring, that flocks are not frozen in their migrations, and that ships have to sail on an actual sea, which changes as the seasons change.

These geophysical phenomena have histories beyond that of humanity and they provide the conditions within and through which humanity can take advantage. Within this framework, geography does not determine social action, but it creates the framework for the possibilities of it. As Lucien Febvre (2013 [1925], pp. 63–4), co-founder of the *Annales* School, makes clear:

Man is a geographical agent, and not the least. He everywhere contributes his share towards investing the physiognomy of the earth with those ‘changing expressions’ which it is ‘the special charge’ of geography to study. Through centuries and centuries, by his accumulated labour and the boldness and decision of his undertakings, he appears to us as one of the most powerful agents in the modification of terrestrial surfaces. There is no power which he does not utilize and direct at will, there is no country, it has been said, which does not bear the marks of his intervention. He acts on the soil as an individual. He acts on it still more collectively – by means of all his groups, from the least to the greatest, from the family groups to the political ones. And this action of man on his environment is the part which man plays in geography.

The possibilities of man are not limitless: they are confined by the limits of our planet and of time. Nature giveth and taketh away. It offers out possibilities on the palm of its hand, but we cannot take what is not offered. It is:

on the basis of these layers of slow history, one can rethink the totality of history, as though it were located atop an infrastructure. All the stages, all the thousands of explosions of historical time can be understood from these depths, from this semi-immobility. Everything gravitates around it. (Braudel, 2009, p. 181)

The *conjoncture*

By stating the narrowness of the limits of action, is one denying the role of the individual in history? I think not. I would conclude with the paradox that the true man of action is he who can measure most nearly the constraints upon him, who chooses to remain within them and even to take advantage of the weight of the inevitable, exerting his own pressure in the same direction.

Fernand Braudel

The second part of Braudel's *Mediterranean* examined the social, political and economic structures of the region. This layer of time – which moves faster than geographical time – develops in cycles and rhythms that unfold over generations. Wallerstein (2009) highlights a key issue of translation when discussing this concept: the French term *conjoncture* is not equivalent to the English word 'conjuncture'. In English, a 'conjuncture' typically refers to a critical moment or turning point with significant historical consequences, often altering the structural tendencies of society. For example, Gramsci viewed the French Revolution and the rise of Fordism as conjunctures that transformed the social and economic structures of Europe and the United States. In contrast, Wallerstein contends that a *conjoncture* refers to a cyclical phase with a distinct A-phase (upswing) and B-phase (downswing), representing periods of rise and fall within a broader historical cycle. In explaining the rationale for this layer of time Braudel (2009, pp. 176–7) argued:

A day, a year might seem appropriate lengths of time for a political historian. Time was the sum of days. But if one wanted to measure a price curve, a demographic progression, wage trends, variations in interest rates, the study of production (more hoped for than achieved), a close analysis of trade, it required much longer measures of time.

To illustrate, we might consider the period from roughly 1890 to 1940 as one *conjoncture*, with its A-phase reaching its peak during the ‘roaring twenties’ and its B-phase culminating in the economic downturn of the 1930s. Similarly, the period from approximately 1940 to 1990 could be seen as another *conjoncture*, with its A-phase ending in the post-war economic boom of the 1950s and its B-phase concluding after the economic crises of the 1980s. These cyclical phases reflect the rhythmic patterns of social, political and economic change over time.

The challenge of translating *conjoncture* into English has led some translators to simply italicise or place the term in quotation marks. Wallerstein (2009, pp. 161–2) proposed resolving this issue by translating *conjoncture* as ‘cyclical phase’. While this captures the cyclical nature of the concept, it still omits the broader temporal and structural dimensions that Braudel associated with this layer of time. Braudel (1982, p. 3) himself suggested that he would have termed this layer ‘social history’ had the term not been ‘diverted from its full meaning’. In Richard Mayne’s translation of *A History of Civilisations* (1993, p. 34), Braudel’s definition of *conjoncture* is more dynamic and fluid than Wallerstein’s. It can mean a period, a phase or a cycle:

Romanticism, the French Revolution, the Industrial Revolution, World War II. The time-scale here may be ten, twenty or fifty years. And facts are grouped, interpreted and explained in accordance with these phenomena, whether they be called periods, phases, or cycles. They can be regarded as events of long duration stripped of superfluous detail.

While imperfect, I believe the best course of action is to maintain the word *conjoncture*. There is clearly a fluidity in the way that Braudel employs the term, and while using ‘cyclical phase’ captures the rhythmic waxing and waning associated with the term, I do not believe it captures its wider meaning. It belies Braudel to cage him and his art into such rigid definitions. Much of this book is structured around the *conjoncture*, showing how the *longue durée* and the

event shape it. In this sense, the work is based on a period of history with our frame of reference both zooming in and out to keep unity between the three layers of time. This methodological approach and usage of the original term, I believe, best preserves the intent of the Annales School while dealing with units of observation across time and space.

***L'histoire événementielle* or episodic history**

The events of history are merely surface disturbances, crests of foam that the tides of history carry on their strong backs.

Fernand Braudel

The final part of Braudel's *Mediterranean* was titled 'Events, Politics, and People' and focused on conventional political history. This layer of time revolves around the individual, representing the fastest-moving of Braudel's three temporal layers. Braudel (1982, p. 3) described this layer as concerned with traditional history, 'on the scale not so much of man in general as of men in particular'. While social history examines humanity through the cyclical evolution of societies, this layer centres on specific individuals: kings, statesmen, military leaders and other key figures. Braudel (1982, p. 3) likened this form of history to 'a surface of disturbance, the waves stirred up by the powerful movement of tides. A history of short, sharp, nervous vibrations. Ultrasensitive by definition, the slightest movement sets all its gauges quivering'. The coherence of Braudel's temporal framework lies in the interconnectedness of these layers: events are embedded within the *conjoncture* and *longue durée* that shape them. Events do not emerge in isolation but are deeply rooted in the longer-term processes that surround them.

However, this layer of time also presents a challenge of conceptual translation. Braudel referred to it as *histoire événementielle*. While the French word for 'event' is *événement*, *événementielle* is an adjective meaning 'event-like' or 'event-ish'. If Braudel had simply discussed *l'histoire événement* (the history of the event), there would be

no issue of translation. But *histoire événementielle* implies a time that is characterised by its event-like quality, requiring a more nuanced translation. Wallerstein (2009, p. 161) offers what I believe to be the best solution to this conundrum, proposing the term ‘episodic history’:

How does one translate [*événementielle*]? What some people do is to translate it as ‘the time of the event,’ but I don’t think that makes any sense whatsoever. It isn’t the time of the event. It’s a time that is ‘event-ish.’ I found a solution which no one else uses; I decided the only way to translate this into English that made any kind of sense is to call it episodic history. An episode is like an event, and episodic does exist in the English language.

With this framework in place, the different layers of historical time have now been established. However, it is important to note that this book will not follow the same structure as Braudel’s *Mediterranean*. Braudel’s work analysed a specific moment in time – the Age of Philip II – making it logical to structure his study around each layer of historical time. In contrast, this book is a journey through time, structured around social history and a sequence of *conjonctures*. It seeks to demonstrate how the *longue durée* shapes specific *conjonctures* and how episodic history unfolds within them. While the structure differs, the methodological approach remains the same, rooted in Braudel’s temporal framework.

World-systems analysis

World-systems analysis is a perspective in creation. It is a holistic, uni-disciplinary view of social reality.

Immanuel Wallerstein

*If everything occurred at the same time there would be no development.
If everything existed in the same place there could be no particularity.
Only space makes possible the particular, which then unfolds in time.*

August Lösch

World-systems analysis moved the unit of analysis away from the nation-state and instead concentrated on historical systems. These historical systems have existed in three forms: mini-systems, world-economies and world-empires. These historical systems are *a world*, but are not necessarily global in scope. It is possible, therefore, to discuss a Mesoamerican world-system, based around the Aztec Empire, or the world-empire of the Romans. These did not encompass the globe, but they represented their own worlds: a spatiotemporal zone with integrated activity, institutions, a network of trade and a division of labour which obey certain systemic rules (Wallerstein, 2004, pp. 16–17). The world-economy that developed in the long sixteenth century (AD 1450–1640) differed in that it was not filled by a single political structure, as had been the case in Rome, Byzantium or China. Instead, ‘the singular feature of this world-economy was the discontinuity between economic and political institutions’ (Wallerstein, 1979, p. 37). The capitalist mode of production, which changed the logic of the political superstructure, created the means through which this incongruity could exist.

Two factors make the modern world-system unique. The first is that the world-system is global for the first time. This in part stemmed from an expansion of the frontiers of western Europe beginning from the eleventh to the thirteenth century. Scandinavians and the Germanic people conquered and converted the Slavs and the Balts; England expanded into Wales, Scotland and Ireland; the Normans conquered southern Italy and Sicily; while Christians gradually conquered Spain from the Moors (Wallerstein, 2011a, p. 78). No matter the form, the general phenomenon remained the same. The growing density of the population led to a great increase in the number of inhabited town centres (Pirenne, 2014 [1937], p. 75). There was also a geographical expansion of the world-system which found its main expression via the European ‘discovery’ of the Americas in 1492. The expansion of the world-system gave renewed vigour to capital accumulation, while the division of labour began to form first between western and eastern Europe, and then between Europe and the Americas (Moore, 2003b, p. 311). By the

nineteenth century, our spatiotemporal zone of integrated activity, our institutions, our networks of trade and our division of labour spanned each continent to create a unified world-system.

The second factor is that the capitalist mode of production has a tendency to become exclusive. In pre-capitalist society, many social formations – and world-systems – could co-exist. The capitalist mode of production differs: it destroys other modes of production. ‘In the peripheral formations ... the dominant capitalist mode subdues and transforms the others: it disfigures them, deprives them of their functionality and subjects them to its own’ (Amin, 1974a, p. 74).

The division of labour that exists within the world-system is both functional and geographical; the range of economic tasks is not evenly distributed throughout the world-system (Wallerstein, 2011a, p. 230). A spatial-economic hierarchy exists whereby the world is divided into a core, periphery and semi-periphery, each of which has a specific role and function. At the formation of the world-system, core areas were the centres of economic activity which were more complex, such as shipbuilding and textile production. Both local and long-distance trade in these areas were in the hands of an indigenous bourgeoisie. Particularly important in the development of core areas was the different relations of production that existed in the countryside and in agriculture. Generally, a relatively large segment was owned by the middle class due to the existence of a competitive rent structure. The periphery, in contrast, still employed a system of coerced labour on large estates based on monocultures and cash crops. The semi-periphery, for its part, had an intermediary system generally based around sharecropping, while its towns and cities (such as those found in northern Italy) were being deindustrialised. This meant that disparate parts of the world-system became dependent on one another, based around their specialised roles. The role of each place could not be understood without understanding its function within the wider world-system.

It is important to note that it cannot a priori be assumed whether a particular economic task is core-like or periphery-like. An activity can become, at a particular point in time, a core-like activity, and

it maintains this characteristic for a limited period (Arrighi and Drangel, 1986). Textile production would have been considered a core activity during the eighteenth century, with a central location in the Dutch and British economies. Today, it would be considered a peripheral activity, with the majority of this economic task being outsourced to countries such as Bangladesh in the periphery. This follows the path of innovation espoused by Joseph Schumpeter (1928). One of capitalism's main strengths is its ability to redefine and reinvent itself in search of better returns. It is this creative destruction that allows the system to find new forms of development and exploitation. The inequality between core and periphery, therefore, can be expressed in changing forms (Petrusewicz, 2019).

Today, the core specialises in control over capital, technology, research and development, and the most advanced and sophisticated products. These countries are economically diversified, rich, powerful societies that are relatively independent of outside controls. The periphery, on the other hand, is more reliant on raw materials and standardised, routinised industrial production. They are economically over-specialised, relatively poor and subject to direct or indirect manipulation by core states. The semi-periphery plays an intermediary role between core and periphery; it generally holds regional, but not global power, and lies towards the middle of the income scale.

The periphery

Despite the reality that primary commodities are necessary for all human existence (let alone development) there is a strong inverse correlation between the level of economic development and the share of the primary sector in the economy (Radetzki, 2010). The periphery's over-specialisation in primary resource exportation affects the form of development that takes place in the country. The international demand for raw materials is relatively income-inelastic, because improvements in technological capabilities allow the core to produce more from fewer raw materials (Magdoff, 1969;

Radetzki, 2010). Capitalist logic entails a continual move towards goods with an ever-higher value per kilogram. This means that the need for raw material input grows less quickly than the economy in general. Any increase in a peripheral country's productivity in exporting or extracting raw materials, therefore, does not necessarily correlate to an increase in demand. Any increase in productivity may only lead to lower per-unit costs, rather than a rise in income for the peripheral country (Furtado, 1965).

This specialisation in the exportation of raw materials impedes government investments in other sectors which could lead to more stable, longer-term growth (Galtung, 1971a). Peripheral countries have a comparative advantage in the exportation of raw materials (Samuelson, 1970); however, without government protectionism, higher value-added products in immature industries cannot compete with the products of core states. In the longer term, the maturation of these industries could lead to a diversification of the economy, resulting in more positive outcomes for the country in question.

The harsh irony is that peripheral countries are correctly performing their economic functions according to classical economists such as David Ricardo (1821) and Adam Smith (2012 [1776]): they are selling their Portuguese wine for English cloth. The difficulty is that it takes an unequal amount of coffee, sugar or copper to buy a German car or an American computer. Classical economists overlooked that the internal dynamics of peripheral societies are conditioned by their position within the capitalist world-economy. Without understanding the wider dynamics at play in the world-system, it is not possible to understand the internal dynamics of such societies. Karl Marx (2011 [1848]), in a directed attack against the likes of David Ricardo and Adam Smith, stated the following:

We are told that free trade would create an international division of labour, and thereby give to each country the production which is most in harmony with its natural advantage. You believe,

perhaps, gentlemen, that the production of coffee and sugar is the natural destiny of the West Indies. Two centuries ago, nature, which does not trouble herself about commerce, had planted neither sugarcane nor coffee trees there. If the free traders cannot understand how one nation can grow rich at the expense of another, we need not wonder, since these same gentlemen also refuse to understand how within one country one class can enrich itself at the expense of another.

The semi-periphery

The semi-periphery plays an important functional role within the world-system (Chase-Dunn, 1988). It includes a mixture of both core and peripheral economic functions and, in essence, plays an intermediary role between the two. It can also be understood as a literal geographical location, spatially located between the core and the periphery. The semi-periphery is an intermediary through which the activities of the core and the periphery are completed. This intermediary role, as both exploiter and exploited, plays an important political dimension within the world-system. The existence of a semi-periphery means that the system can avoid too sharp a polarisation between the two poles. The semi-periphery deflects some political pressure that would normally be directed towards core states, thus inhibiting alliances between poorer nations. For example, Mozambique may feel aggrieved by the actions of South Africa, or Uruguay by Brazil. This reality makes cooperation between the periphery and semi-periphery difficult in shaping the system, helping to maintain the hegemony of core states. Economically, the semi-periphery provides an outlet for capital investment from the core into lower-wage industrial production. Importantly – and in moving away from the modernist approach of stages of development – the semi-peripheral countries should not be understood as being at an intermediate stage of development between the core and the periphery. Countries in the semi-periphery can move from their position to that of the core (they can also move

from the semi-periphery to the periphery), but this is not a given. As Arrighi and Drangel (1986, p. 11) argued:

The existence of a relatively stable intermediate group of states is at variance with the expectations of modernization [theory]. According to modernization theory, intermediate positions are temporary because they are transitional. States come to occupy intermediate positions on their way from backwardness to modernity.

States and nations

While our unit of analysis is the world-system, our units of observation are what we may term stateless nations; that is, nations (loosely defined) without independent statehood. This raises two fundamental questions: first, what constitutes a nation, and secondly, how does statehood affects a nation's capacity for independent action within the world-system. Neither question admits easy answers, as we attempt to impose unity and generalisability on inherently diverse situations. As Hobsbawm (1992, p. 6) observes, we are trying to 'fit historically novel, emerging, changing and, even today, far from universal entities into a framework of permanence and universality'. We are therefore dealing with ideal types that will inevitably fall short of empirical reality, yet what remains clear is the connection between evolving state forms and the political construction of nationhood.

The discontinuity between political and economic institutions is a central feature of the modern world-system. Rather than the creation of a world-empire, there has instead been a tendency for states to be the general political form, with an interstate system as codified by the Treaty of Westphalia of 1648. 'Thus although the continuous drive towards the accumulation of capital, which is the main characteristic of the system, has proceeded on the basis of a single global division of labour, political activities within the system have largely been oriented around the nation-state' (Wallerstein, 1991a, p. 140). It is therefore generally *through* the state that labour has been reorganised in the service of capitalist production.

In the early period of the modern world-system – running from the long sixteenth century through to the French Revolution – it was mercantilism, absolutism and the interstate system itself which bound these states together. While the strength of the state was important, calls in the name of the nation were yet to be heard. The French Revolution changed this reality when it was argued that sovereignty did not lie with the sovereign, but instead with the people. For the first time, the growing secular religion of nationalism as a political force was awakened. ‘This middle-class nationalism had in it from the first a democratic and potentially popular flavour which was wholly foreign to the 18th century ... Napoleon, by posing as the champion and mandatory of the emancipated French nation, made himself the chief missionary of modern nationalism’ (Carr, 1945, p. 8).

The working classes were not considered part of the people that constituted the nation; this was no more than a bourgeois nationalism that was still intimately linked to the property rights and wealth of the middle classes, yet Pandora’s box could not be closed. The nation in its more popular and plebeian understanding was here to stay. The breakdown of traditional local and social ties which resulted from the profound changes of the industrial revolution intensified the psychological need to feel part of some form of community. Membership in the newly emerging nation-state fulfilled that role. The nationalisation of the state brought with it an increase in state institutions such as universal compulsory education and the extension of the franchise, while the development of industry led to the expansion of workers’ organisations and an increase in the self-consciousness of working people as a force.

Nationalism

Must a nation’s existence, then, be reduced to a matter of political economy and cyclical shift (conjuncture)? No. Because the framework of a community depends upon the past. And cyclical shifts only affect matters via the social classes that experience it. But these classes,

*for their part, weigh historical circumstances on the scale of their
discontents, their satisfactions, and their opportunities to act.*

Pierre Vilar

‘The nation’ evokes the notion of permanence. It is of the sages. Immemorial. We mere mortals can never truly grasp the wishes of the nation. This aura is its defining strength. This framing belies the reality that nations and the people who constitute them have been created. Nationalism is intimately tied up with notions of statehood and this remains its main focus; it is always an argument about the seizure or consolidation of power. It is strictly a modern ideology, born from European absolutism and the fusion of politics, culture and the state. This creates an issue of clarity and confusion. ‘Peoples’ of the modern world-system are likely to have some cultural linkage with pre-modern political entities. In fact, this work presumes this. We presume that the Catalan nation of today developed from the kingdom of Aragón, which in turn developed from the principality of Catalonia. We must keep in mind that while we are creating unity between the past and the present, the form of any Catalan ‘nationhood’ in the fourteenth century should not be understood as being analogous to nationhood today. However, we can only tell the past as it is, not as it was. If history is, as Lucien Febvre argues, the science not only of the past but also of the present, this unity helps to say something more of our condition today.

Yet if nationalism is a modern phenomenon, why do stateless nations continue to exist? Why has the nationalism of the state been incapable of completely flattening the differences that exist between peoples? The answer to this question is found in history. States tend to develop from a politico-economic core: Wessex in the case of the UK, Paris in the case of France, Prussia in the case of Germany, Piedmont (via the kingdom of Sardinia) in the case of Italy, and so on. State formation is the process of a core region conquering surrounding areas, which in turn become absorbed into the territorial state (Lipset and Rokkan, 1967). These newly conquered areas may become internal peripheries. The administrative and economic

system, the culture and the language of the core are pushed out to the peripheries. This process (like capitalism) progresses unevenly. The core, which is at the centre of the state they have created, sees itself in the image of the new nation.

The penetration of capitalism and state institutions into the peripheries is restricted by geography, differing social structures and languages. These residual differences mean that it is more difficult for the state to penetrate the periphery as completely as it does the core. In many such cases, therefore, politicised nationalist sentiment today is a transposition and consequence of uneven capitalist and state development from hundreds of years ago. Nationalism is a phenomenon connected not with industrialisation and modernisation *per se*, but with its uneven diffusion (Gellner, 1964). Tom Nairn (1975, p. 8) dug to the roots of the begrudgingly persistent political nationalism of stateless nations:

The subjectivity of nationalism is an important objective fact about it; but it is a fact which, in itself, merely reposes the question of origins. The real origins are elsewhere. They are located not in the folk, nor in the individual's repressed passion for some sort of wholeness or identity, but in the machinery of world political economy. Not, however, in the process of that economy's development as such – not simply as an inevitable concomitant of industrialization and urbanization. They are associated with more specific features of that process. The best way of categorizing these traits is to say they represent the uneven development of history since the eighteenth century. This unevenness is a material fact; one could argue that it is the most grossly material fact about modern history. This statement allows us to reach a satisfying and near-paradoxical conclusion: the most notoriously subjective and ideal of historical phenomena is in fact a by-product of the most brutally and hopelessly material side of the history of the last two centuries.

The persistence of minority nationalism is therefore due to the relationship between two complementary forces: the unevenness

of capitalist penetration and the unevenness of state penetration. This leads to an inquiry about the dialectic which exists between minority and majority nationalism. Minority nationalists do not see themselves in the image of the nation; the image created by the majority. As the bourgeoisie create their own gravediggers, so too, nation-states create theirs.

There is an inherent antagonism between state-led and state-seeking forms of nationalism. While the former is preoccupied with preserving the territorial integrity of existing states in an interstate system, the latter challenges the integrity of states. This historical tension between these two distinct forms of nationalism is an integral part of the co-evolution of the capitalist world-economy and the modern interstate system ... These two opposite forms of nationalism are dialectically related to each other as they produce and reproduce one another. (Karataşlı, 2020)

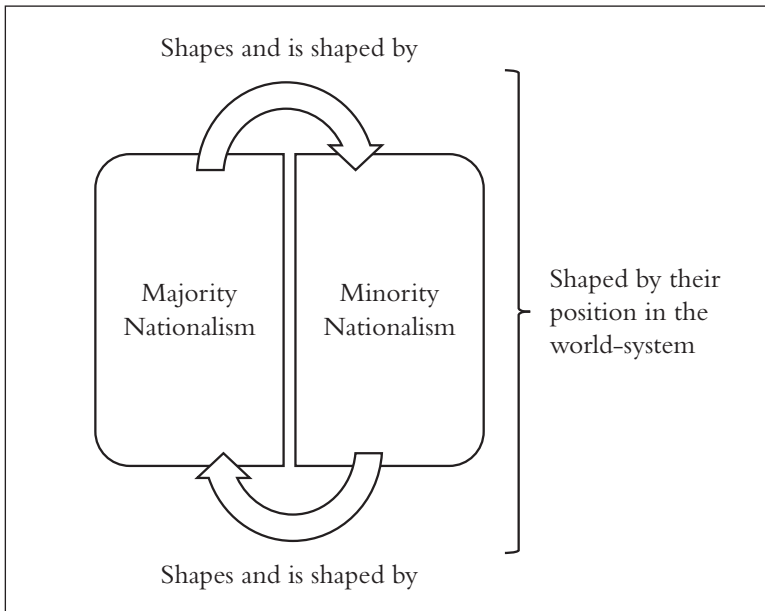


Figure 3: The dialectical relationship between majority and minority nationalism (author's own).

CATALONIA AND SPAIN



The Kingdom of Castile, ca. 1400

Figure 4: The Iberian Peninsula c. 1400 (Claussen, 2020).

‘Why Spain?’ was a question that I had to answer for myself even as I attempted to answer it for others. My own answer, as it has evolved over the years, is that this is an endlessly fascinating country whose history, made up of striking successes and equally striking failures, embraces topics of universal import. Here is a country and a people whose past saw the construction and subsequent

deconstruction of complex religious and ethnic relationships as it stood poised between the worlds of Christianity, Judaism and Islam; a country that took the lead among European powers in conquering and governing a vast overseas empire, and that has persistently sought, and never quite succeeded, in reconciling the conflicting demands of unity and diversity on its own territory; and a country whose religious, cultural and artistic achievements over the course of the centuries have made an enormously rich if often controversial contribution to human civilization.

J. H. Elliot

Spain presents a paradox. It was the first European state to construct a global empire. Its galleons controlled the oceans, its gold and silver was central to global capital flows, and its monarchs claimed authority over two worlds. And yet, within the historical logic of capitalist modernity, Spain was never a *true* hegemon. It failed to industrialise early, nor did it consolidate a national bourgeoisie capable of transforming its feudal inheritance. Rather than becoming the hegemon of capitalist modernity, it became a cautionary tale. It was a state enriched by extraction, happy to live on the parasitic social relations it engendered. The central theme of Spanish history is how imperial power masked a structural dependency which arrested development and the creation of a coherent internal economy. Spain's role in the global transition from feudalism to capitalism was foundational, but it was also self-limiting. Its imperial reach became a substitute for domestic transformation, and its wealth was sustained by coercive extraction without productive reinvestment.

The uneven geography of the Iberian Peninsula via its fragmented ecology, disparate political traditions and sharply bifurcated class structures precluded a unified or endogenous developmental trajectory. Castile and Catalonia, though bound by dynastic union, followed fundamentally different historical paths. Castile, landlocked and latifundist, constructed a state rooted in military conquest and ecclesiastical power. Catalonia, urban and commercial, constructed a state based on proto-industrialisation

and maritime trade. The Spanish state that emerged from their union was not a coherent nation but a composite monarchy that preserved internal disparities while projecting external dominance.

But history is not incidental. The geography of Iberia conditioned the forms of labour, property and power that developed within it. The expansion of Castile into al-Andalus reproduced a feudal-colonial model. Land was expropriated while its Muslim inhabitants were displaced. The ecological infrastructure of Muslim Spain with its irrigation systems, agricultural innovation and urban density was degraded by Christian incursion and replaced by extensive pastoralism and elite rent-seeking. The *Reconquista* was not only a religious project, it was a class project: one that expanded the power of the nobility and entrenched a non-productive elite.

This internal class structure was then projected outward. Spain's conquest of the Americas extended its feudal model across the Atlantic, fusing settler colonialism, ecclesiastical supremacy and extractive labour regimes. In the New World, Spain built an extractive economy. The mines of Potosí and Zacatecas became the lifeblood of the imperial state which underwrote its military and courtly expenditures while hollowing out its internal economy. The import of silver from the Americas was not used to stimulate productivity. Instead, it fuelled inflation, parasitism and dependence on foreign producers. Spain became the empire that paid for the development of others.

In this light, Spain's early modern history appears less as a rise and fall, and more as a prolonged structural contradiction. While it expanded outward, it did not consolidate inward. It accumulated vast sources of wealth, but did not reinvest it productively. It retained an aristocracy rather than giving rise to a bourgeoisie. Any attempt at reform was blocked by an entrenched elite which had grown strong and fat on colonial revenue.

This chapter traces these contradictions from the geographical foundations of Iberian social structure, through the formation of the composite monarchy, the colonisation of the Americas and the eventual disintegration of empire. Throughout these *conjunctures*

the enduring problem for Spain was its structural location within the world-economy which was brought about by its own internal incohesion. Even at its zenith, Spain was busy creating the conditions for its own peripheralisation.

Geography

The Iberian Peninsula's central plateau, the *meseta*, rises like a citadel of a Spanish castle, ringed by mountains and arid interior lands, cut off from the seas that historically served as the arteries of civilisation. This physical isolation shaped not only settlement patterns and agricultural viability but also the rhythms of trade, communication and conquest over the *longue durée*. The *meseta* became the heartland of Castile – expansive, landlocked and inward-facing – while Catalonia, nestled between the Pyrenees and the Mediterranean, looked outward, eastward and toward the sea (Braudel, 1995a).

In antiquity, it was the Mediterranean that served as the great connective sea of civilisation; the liquid space through which ideas, goods, peoples and empires flowed (Pirenne, 2014 [1937]). The Greeks, Carthaginians and Romans all used the sea as a corridor of colonisation and commerce. Under Islamic rule, the western Mediterranean remained vital, linking al-Andalus with North Africa and the broader Islamic world. Catalonia's geography, mountain-guarded yet open to the sea, allowed it to participate in this maritime civilisation long after Castile turned its gaze inward. The principality of Barcelona, and later the Crown of Aragón, emerged as Mediterranean powers. Their fortunes tied to the ebb and flow of long-distance trade, naval prowess and commercial diplomacy in the great landlocked sea.

The Pyrenees, while often imagined as a barrier, also acted as a zone of interaction and exchange. The early Marca Hispana (Barcelona March) established by Charlemagne linked Catalonia with Carolingia, Provence, Languedoc and Occitania. This infused Catalonia with linguistic, legal and artistic influences that further

differentiated it from Castile. Barcelona became a centre of commerce and civic life, plugged into Mediterranean networks stretching from Genoa to Alexandria. This outward-looking orientation persisted into the age of the Crown of Aragón, whose dominions extended across the Balearics, Sicily, Sardinia and southern Italy.

This geographical divergence did not disappear with state formation. Castile's geography helped shape a different historical path. Its development on the dry *meseta*, with limited access to navigable rivers or ports, favoured a society based around a landed aristocracy. Its expansion into al-Andalus and later the Americas entrenched a feudal economic structure that relied on coerced labour and extensive latifundia. This differed from Catalonia's network of cities, its maritime focus and its commercialism. The divergent environmental and spatial realities of these regions produced fundamentally different social structures: feudal aristocracy and clerical conservatism in Castile; urban capital and proto-industrial dynamism in Catalonia. Even when unified under the same crown, they inhabited different material and symbolic geographies; different worlds within the same borders.

Geography, over the *longue durée*, structured not only the physical terrain of Iberia but the historical possibilities of its peoples. It mediated power, shaped identities and set the contours for the enduring tension between centre and periphery, land and sea, Castile and Catalonia. To ignore the geographical foundations of Iberian history is to misunderstand the very architecture of its political development.

The crown of Aragón

Aragón and Catalonia, in many ways, owe their existence to the Moors and to the confrontation that long defined the relationship between Christianity and Islam. As early as 795, Charlemagne established the Marca Hispana across the Pyrenees as a buffer zone between the Franks and the Moors. While both Aragón and Catalonia emerged from the patchwork of Visigothic kingdoms

that once existed in Iberia, neither could truly claim a distinctive tribal culture. Rather, these geopolitical constructions were born in the shadow of the Pyrenees, forged in resistance to the Moors. Barcelona became one of the principal points of contact between the Christian and Muslim worlds. In Aragón and Catalonia, 'the mountain resisted the plain, and prevailed' (Bisson, 1991, p. 28).

Thanks to the establishment of the Barcelona March, Catalonia had existed as a defined territory from the ninth century, yet it was in the twelfth century that it truly began to flourish. This was largely due to the creation of the crown of Aragón, brought about by the marriage of Ramon Berenguer IV, count of Barcelona, and Petronilla, princess of Aragón, in 1137. Their union established a feudal state in southern Europe that would maintain its independence deep into the fifteenth century. Castile had also aspired to a union with Aragón, but the Aragónese decision to favour alliance with Catalonia is likely explained by Catalonia's maritime orientation, in contrast to Castile's continental focus. Via the Ebro River, Aragón now gained access to the great artery of commerce known as the Mediterranean. In hindsight, the decision proved prescient. It was the coastal county of Barcelona that became the launchpad for a series of commercial, political and military successes which 'catapulted the kings of Aragón from their lowly status as second-rate Spanish rulers into primacy in the western Mediterranean' (Abulafia, 1999, p. 644).

Catalonia followed the broader European trend of the time: territorial expansion, population growth and urban development. This was reflected in the cultivation of new lands and the striking outward growth of its frontiers across the continent's peripheral societies. From the twelfth through to the fifteenth century, the crown of Aragón expanded to incorporate Valencia, Castellón, Alicante, the Balearic Islands, Andorra, Sardinia, Sicily, Corsica, the kingdom of Naples and parts of Greece. Although this expansion occurred in the name of the crown of Aragón, it was the counts of Barcelona and their political elite who were the true drivers of conquest. By 1250, Barcelona had undoubtedly become the economic, commercial and urban capital of the crown. This

expansion effectively partitioned Iberia between three dominant powers: the Crown of Aragón, the Crown of Castile and the emerging Kingdom of Portugal under Afonso Henriques.

The crown's expansion occurred piecemeal. Like the later union with Castile, this was a confederal arrangement and each newly incorporated region was governed according to its own customs and political conditions. Majorca and Minorca fell in the decades following 1229, the former *taifa* state of Valencia, rich in resources, was incorporated in 1238, Sicily followed in 1282, Sardinia in 1323 and the Kingdom of Naples by 1442. By this time, the western Mediterranean was effectively in the hands of this great medieval power.

These new territories formed the backbone of the Crown of Aragón's Mediterranean trade. Sicily became a granary for export while Sardinia became a source of silver and occupied a vital strategic location. Catalan textiles were exchanged for these goods. The control of central Mediterranean locations also allowed the crown to dominate trade from the African coast, especially its lucrative spice markets (Vives, 2015, p. 204). The trade of spices had such a pre-eminence due to the ease with which it was shipped and the high prices it commanded. Naples, positioned at the outer edge of Aragónese expansion and one of the largest cities in medieval Europe, offered a vast market for Catalan consumer goods and cloth. This commercial and political ascendancy culminated in the transformation of Barcelona, between the twelfth and fifteenth centuries, into 'incontestably the greatest city in Spain and one of the leading Mediterranean cities, rivalling Genoa and Florence in the volume of its trade and the power of its combined merchant marine navy' (Jackson, 1972, p. 118).

The Catalan (Re)conquista

The *Reconquista*, defined as the Christian conquest of Muslim Spain, is usually considered a Castilian or Spanish endeavour, culminating in the fall of Granada in 1492. However, this process began much earlier and was central to the expansion of the Crown of Aragón.

Within Spanish mythmaking and historiography, this process was termed a *Reconquista*; a reclaiming of lands once believed to have belonged to 'Spain'. The reality, however, is that Spain, in any meaningful political sense, did not exist prior to the Arab conquest. How, therefore, can one reclaim what was never theirs? It is clear that one man's reconquest is another's conquest.

While the notion of a *Reconquista* will be used here for linguistic ease, it is important to recognise that this was not the story of a nation recovering lost lands. The Spain that emerged after the *Reconquista* bore little resemblance to any political or cultural formation that may have existed before the arrival of the Moors. What is less in doubt are the long-term consequences this conquest had for Catalan-Aragónese and Spanish development. Of particular importance was the uneven nature of this process, which produced divergent social and economic structures across the peninsula.

This Christian conquest did not take place in an empty wilderness, but rather in towns and cities, in cultivated fields of olive, orange and almond groves, and in a landscape shaped by advanced Islamic irrigation systems and farming techniques. It occurred within the social milieu of a flourishing Islamic material and cultural reality. This reality could not simply be erased; it had to be confronted. Muslims would either be converted, expelled or forced to submit to the new political, economic and ideological order of the Christian kingdoms.

Madina Mayurqa was the first Islamic region to be besieged by the Catalans in 1229 in what Braudel (1995, p. 786) termed a 'typical form' of colonialism. After its capitulation, Jaume I of Aragón adopted the name of his Muslim predecessor and proclaimed himself king of Majorca. Today, disembarking from the train in Palma, one is greeted by the *Plaça d'Espanya*, which commemorates him by his popular title *el Conquistador*. The fall of Majorca led to the wholesale displacement of the island's Muslim population. Many were sold in the slave markets of Barcelona, while the island itself was resettled and Catalanised. The old Muslim communities were dismantled, and those who remained were compelled to work on newly created

estates for absentee landlords. Minorca, fearing a Catalan invasion and the fate that had befallen Majorca, surrendered in 1231 without the need for bloodshed. In return, Jaume I granted the island self-government and permitted the continued free practice of Islam, on the condition that it pay tribute to the crown.

On the mainland, Catalan expansion pushed southwards towards Valencia. As with Minorca, many regions were offered surrender treaties. Muslims were generally allowed to retain their marriage customs and continue instruction in the Qur'an, in exchange for a one-eighth tax on their wealth. However, in the towns and cities of the Ebro Valley, Muslims were forced to relocate outside the city walls into newly designated Moorish quarters, or *morerías*. Muslims retained their agricultural lands outside the cities, meaning that the resettlement primarily affected urban populations. The countryside's agrarian structure was left relatively intact (Vives, 2015, p. 158). The retention of the agricultural structure favoured Catalan knights, farmers and merchants rather than the nobility. While the nobility was redistributed unproductive mountainous terrain, it was the farmers and knights of the north that now worked the more productive land alongside their Moorish counterparts. These new farmers were 'quick to adapt to the specialised methods of the Moors in cultivating the rich Valencian *huertas*, with their crops of sugar, rice, fruit and wine, and were imbued with the democratic spirit of the communities from which they came' (Reed, 1979, p. 66). This relatively more egalitarian agrarian structure allowed a middle-class peasantry to rise. 'In this way, the elites of Catalonia found their way to modernity ... and developed into an economic centre of Spain' (Nolte, 2003, p. 54).

The cities, meanwhile, were transformed into miniature Barcelonas. Valencia's orbit now turned entirely towards Catalonia, adopting not only Catalan legal practices but also a vernacular based on the Catalan language. The countryside, however, remained overwhelmingly Muslim. Christian kings ruled over Muslim societies. It was not until the forced conversion of Muslims

in Valencia and Aragón in 1526 and the final expulsion of Moriscos¹ in 1609 that the de-Islamification of the crown was completed. 'The Moriscos numbered 300,000 and were mostly agricultural workers, disproportionately located in Valencia and Andalucía. The expulsion of the Moriscos tore at the internal social structure of Spain' (Wallerstein, 2011a, p. 194).

Late medieval crisis

The expansion of the Crown of Aragón in the thirteenth and fourteenth centuries marked a high point of Catalan commercial and naval power, yet the late medieval period represented a period of structural crisis. Demographic decline, rural unrest and merchant overreach destabilised the internal coherence of the crown. The weakening of urban elites and the crisis of feudal reproduction in the countryside led to a class struggle over the future of the Catalan economy.

The *remença* system bound Catalan peasants to the land through a series of oppressive feudal exactions named the *mals usos*. These exactions included payment for marriage, inheritance or to leave the land. This had become a part of a broader strategy to extract surplus from the peasantry. The lords' ability to extract surplus had decreased, in large part due to the Black Death, which led to population decline, soil exhaustion and regional instability. The Black Death increased the importance of labour comparative to land, as most regions were now land rich but labour poor. This scarcity led to price volatility, while the landlords tightened their grip on their serfs with extra vigour. The increase in the importance of labour, however, meant that the peasantry could increasingly resist.

From the 1440s, rural unrest swept the countryside with the peasantry demanding the abolition of *mals usos*, the right of mobility, and protection from aristocratic violence. These uprisings were not random acts of violence but were instead aimed at the

1 Moriscos were former Muslims and their descendants that were forced to convert to Christianity or be exiled.

structure of feudal authority itself (Vilar, 1971). This coincided with an urban crisis. The *Generalitat*, which was dominated by the merchant oligarchy of Barcelona, was unable to mediate or respond to the collapse of rural stability, while the merchants themselves had become overstretched. This dual crisis of peasant rebellion and urban paralysis led to the gradual erosion of the feudal order. In 1486, the *Sentencia Arbitral de Guadalupe* formally abolished hereditary servitude in Catalonia. The peasantry, in their struggle, had won.

The abolition of *mals usos* did not, however, usher in peasant prosperity. While serfdom was ended, land remained concentrated in aristocratic hands, and peasant holdings were often reduced to insecure tenancies or small plots embedded in debt relations. Nonetheless, the structural transformation of the Catalan countryside was real. The old feudal obligations of the past had collapsed and a new class structure emerged. Surplus would now be extracted via economic means through market dependency and tax, rather than the old extra-economic means of coercion via seigneurial rights.

Union of Castile and Aragón

The Crown of Aragón remained an independent state until its union with Castile. This political unification did not result from conquest, but from marriage. It was the 1469 marriage between Isabel, princess of Castile, and Fernando, prince of Aragón, that eventually united the two crowns and, with them, the majority of the Iberian Peninsula. Isabel was not proclaimed queen until the death of her half-brother – King Henry IV – in 1474. The following year, both Isabel and Fernando agreed to officially declare their equal rights over their respective crowns and ruled jointly (Travalia, 2022). This union served the interests of both realms. It helped Castile consolidate its power on the peninsula, especially as the *Reconquista* was drawing to a close. For Aragón – and the principality of Catalonia in particular – ‘the idea of being able to count on

markets such as Castile and Andalusia for their cloth, tools, coral and spices was extremely attractive' (Vives, 2015, p. 312).

Both crowns comprised distinct historical kingdoms. The Crown of Aragón included the Kingdoms of Valencia and Aragón and the Principality of Catalonia. The Crown of Castile, for its part, consisted of three historical kingdoms: Andalusia (which expanded further after the completion of the *Reconquista*), Galicia and Toledo. It also included the principalities of Asturias, Castile and León, Extremadura and Murcia. The monarchy retained this confederal structure and did not establish fully centralised institutions (Payne, 1991). The dynastic union preserved different legal systems, autonomous institutions and customs borders. Spain under Fernando and Isabel, therefore, was not a nation-state, but an association of kingdoms, states and peoples united in the sovereigns (Braudel, 1995b).

The degree and nature of this confederality differed between the Crowns of Aragón and Castile. In Castile, the historical kingdoms served more as cultural reference points, a nod to a past of difference. The Castilian government was becoming increasingly centralised, with the main levers of power based in Toledo and Valladolid, with a common legal system being established by the sovereigns for all Castilian inhabitants. The three Basque provinces, which retained their own financial and political systems (the *fueros*), were the exception that proved the rule. By contrast, the Crown of Aragón maintained a distinct government structure from Castile, with internally differentiated institutions and separate *Cortes* for each of its three constituent territories, with no equivalent to the Castilian common law.

Moreover, the economic and financial institutions of the two crowns remained independent. The sovereigns, in their dynastic union, did not dismantle the internal and external trade barriers or agreements that had existed previously. On the one hand, this allowed the Principality of Catalonia to maintain its economic position in the Mediterranean. Aragónese territories remained Aragónese; Castilian territories remained Castilian. This separation would have

far-reaching consequences in the decades following 1492 and the so-called ‘discovery’ of the Americas. It was not ‘Spain’ that discovered the New World, it was Castile. The other kingdoms of the peninsula therefore had no legal rights to trade with the Americas. During the reign of Fernando and Isabel, the two sides of the Hispanic medieval economy continued to live separate lives: one side of the Janus face looking towards the Mediterranean, the other towards the Atlantic.

While it would not be until much later that the nation-building process in Spain would begin, the union of Castile and Aragón, and the *Reconquista* would become its creation myth. Spanish identity came to be associated with the national religion of Catholicism. The *Reconquista* and the expunging of al-Andalus from the collective Spanish memory was an important event in combining the notion of Spanishness with Catholicism. The *Reconquista* had become more than just a way of claiming land: it had evolved into a means of social reproduction and development within Spanish society. Fernando and Isabel, through the crown, embodied this unity; they were its ‘original authors’ (Braudel, 1995b, p. 669). The role played by Catholicism was political, social and ideological because it created a cohesive feeling of unity.

The Reconquista

*We will search in the margins of your history, in distant countries,
for what was once our history. And in the end we will ask ourselves:
Was Andalusia here or there? On the land ... or in the poem?*

*Castile will raise
its crown above God’s minaret. I hear the rattling of keys
in the door of our golden history. Farewell to our history! Will I be
the one to close the last door of the sky, I, the last gasp of an Arab?*

Mahmoud Darwish

Before the rise of Castile and Aragón in the Iberian Peninsula, Muslims from the Maghreb and as far away as Syria were busy

building a new society. This society, based on a considerable degree of religious tolerance and equality in social life, would become known as al-Andalus. While what is today Andalucía owes its name to this society, al-Andalus, at its greatest extent, referred to all of Iberia save for the stubborn, rugged and mountainous areas of the north. Christians living on the peninsula were offered surrender treaties and were able to maintain their faith and customs. For many, Islamic rule was freer than the Visigothic rule that had preceded it.

Though the distance between al-Andalus and Syria is vast, both belonged to a single world: that of the Mediterranean. The Syrians were adept farmers, skilled in irrigation and agricultural techniques that had served them well in their eastern Mediterranean homeland. These methods proved equally effective in the western reaches of that same world. Not only did the Muslims bring Islam, they brought a developed system of agriculture.

The poet Georges Duhamel once wrote, *là où l'olivier renonce, finit la Méditerranée* (where the olive tree surrenders, the Mediterranean ends); so it was also with Islam's expansion into the western Mediterranean. The furthest northward expansion of Islam coincided with the northern limits of olive tree cultivation (Vives, 2015, p. 108). Olive oil became one of al-Andalus's principal exports, alongside almonds, lemons, figs and oranges; produce which now have deep resonance in Spain.

Islam also facilitated a major transmission of knowledge from the East to Europe and the Christian world. Expansion from the Arabian peninsula – unified by a common religion – made this transmission more seamless. This Islamic society in western Europe thrived in part due to its religious tolerance and its belief that there was no incompatibility between religion and science. This belief helped usher in a golden age in Iberia, marked by scientific advancements in medicine, mathematics and astronomy, as well as the establishment of public baths, libraries and the flourishing of the arts, literature, poetry and architecture. This contact laid the groundwork for the scientific and technological developments

that would emerge in Europe in the centuries to come during the Renaissance: it was through Muslim scholarship that the scientific method – originally developed in the Hellenistic world and ancient Egypt – was reintroduced to the West. The lasting influence of the Muslim world in Europe is still found through language today. Cotton – or *cotone* in Arabic – passed through Europe via Genoa. The woven fabrics of damask came from Damascus, baldachins from Baghdad and gauzes from Gaza. In the English language, we can thank Arabic and the meeting of East and West for words such as orange, spinach, tarragon, alcove, syrup. The fingerprints of this old connection is still with us to this day. As Braudel (1996, p. 83) wrote regarding the excellence and beauty of al-Andalus:

In this garden of towns, there were two great metropolises: Córdoba and later Seville. Córdoba was the centre of learning for all of Spain, and the entire Western world, whether Christian or Moslem, and both towns were capitals of art and centres of civilization ... It [took] a long time to heal the scars caused by the Christian Reconquest ... in Andalusia.

The process of reconquest

The Castilian reconquest differed from that undertaken by the Crown of Aragón. This is due, first, to the fact that the Aragóne reconquest generally occurred earlier and followed a more piecemeal process, meaning that vast frontiers of newly conquered land were not created in a short period of time. Secondly, the Aragóne reconquest took place in regions closer to the centre of their power and further from the heartlands of Islamic Spain. This made counteroffensives by the Moors more difficult and resettlement easier. These differences were to have major consequences.

While Granada did not fall until 1492, the other regions of southern Spain began to fall earlier, between the late thirteenth and the fifteenth century. In these areas, Muslims were expelled not only from the cities as had occurred in earlier reconquests,

but also from the countryside. The expulsion of Muslims from the countryside created a vast frontier system; lands no longer owned or administered, where lawlessness could take root. These new territories – now incorporated into the kingdom – accounted for roughly half of its land area. A huge demographic vacuum emerged in the south that needed to be filled. To address this, the crown granted large estates on these lands to aristocratic Castilian families who had participated in the reconquest. These families established an extensive latifundia system across the new frontier lands. By reinforcing the power of the aristocracy, this system hindered the development of a bourgeois or mercantile class, instead sustaining a parasitic aristocratic order.

The ecclesiastical military orders of Calatrava, Santiago and Alcántara became major landholders in newly conquered territories, administering vast tracts of land with relative autonomy. These orders imposed a structure of surplus extraction based on labour services, rent and military obligation. Unlike the nucleated villages and compact manors of northern Europe, Castilian settlements on the frontier were often dispersed and the logic of war permeated the structure of land tenure. This system of feudal colonisation produced a class formation in which landowners were not primarily interested in agricultural improvement but in rent extraction and military support (O'Callaghan, 1983).

This frontier society and its accompanying conquest radically altered the social structure of Spain, which had existed since the arrival of the Muslims in the eighth century. Before the fall of Granada, the reconquest had, for the most part, been a slow and attritional crusade fought in the name of Christendom. The rapid collapse of Muslim Spain and the seizure of enormous wealth created a vacuum filled by the Castilian aristocracy. These elites were granted generous royal concessions of newly acquired Andalusian properties. The expulsion of the Andalusian peasant population made it impossible to maintain the high level of agricultural technology that had characterised Muslim rule. Rich grain and fruit lands were converted into areas for cattle grazing, further

entrenching the power of the landholding aristocracy. The ‘rapid advance of the Christian frontier made it difficult for the Crown to officially organize the repopulation on such a large scale and altered the balance of power toward the nobility and military orders, who were required for conducting an effective occupation and defence of the new lands’ (Oto-Peralías and Romero-Ávila, 2017, p. 60).

This resettlement and the new social structure it engendered would shape Spanish society into the modern era. The transformation of al-Andalus and its economy did not occur under favourable circumstances but rather through mass expulsion across a vast frontier. The Moors, emerging as they did from arid lands, had been the cultivators and stewards of Andalusian agriculture. Their expulsion led to the collapse of southern Spain’s agricultural productivity and the subsequent desertification of the region. Although there was a concerted effort by the Christian crown to maintain the irrigation systems of al-Andalus, these efforts were hampered by a lack of expert knowledge (Retamero and Martínez-Enamorado, 2018, p. 266). The newly secured frontier thus became a zone of low population density, defined by an agricultural system based on large estates held by the nobility, which ensured and perpetuated pre-capitalist social relations based on extra-economic coercion (Cabrera-Muñoz, 1989).

The Kingdom of Granada represented a source not only of revenue but also of patronage. The royal patrimony had diminished, and the monarchs did not wish to cede more of it to already overmighty subjects. Towns across the kingdoms had consistently resisted attempts to appropriate their lands. The acquisition of Granada provided a solution to the monarchs’ problems. According to law, rulers could not alienate inherited patrimony, but they were permitted full discretion over conquered lands. By the end of the conquest of Granada, more than half the surface area of the kingdom had been distributed among nobles. (Fernandez-Armesto, 2011, pp. 29–30)

This land redistribution provided the economic base for a judicial and social superstructure in which the balance of power favoured the nobility at the expense of the peasantry and gentry. This occurred at a time when the balance of social forces was slowly beginning to shift in England. Effectively, at a moment when social and economic structures in the Atlantic world were evolving, those in Spain were becoming crystallised. The consolidation of a feudal class structure in Castile obstructed the emergence of a capitalist dynamic and impeded long-term development. The nobility continued to acquire large estates and relied on extra-economic coercion to maintain their dominance.

Catalonia, by contrast, was not subjected to the same economic and social constraints imposed on the south. It witnessed the rise of a powerful commercial agriculture, aided in no small part by the abolition of serfdom following the peasant revolt of 1486 (Moreno Zacarés, 2018). With the end of serfdom, peasants began to accumulate land through inheritance, purchase and marriage. By 1700, many of these former peasants employed sharecroppers to work their land and had risen to become part of a new professional middle class (Marfany, 2016). As in England, a tripartite social structure emerged, composed of landlords, a commercially oriented middle class and landless labourers. This new middle class, responsive to changing market conditions, adapted agricultural production according to prices. For example, they began to cultivate vines to produce wine for higher profit. Furthermore, the growth of large farms in the hands of this middle class led to social dislocation in the countryside. Newly landless peasants migrated to cities in the hope of selling their labour power. Much of this labour was absorbed by the burgeoning Catalan textile industry. Catalonia's relative autonomy meant that its economic and social structures remained largely unaffected by the processes reshaping the south. This allowed it to develop along lines similar to those of southern England. This autonomy enabled Catalonia to respond to its own needs, a luxury denied to the internal peripheries of the south.

Sugar and the new frontiers

The Iberian powers did not confine their conquest to the peninsula. The fifteenth century also saw their settlement in islands off the African continent. Portugal discovered Madeira in 1419 and began settlement in 1425, while Castile began their conquest of the Canary Islands in a process that spanned the fifteenth century. Madeira, by all accounts, was uninhabited when the Portuguese arrived, whereas the Canary Islands were inhabited by the Guanches, a group that likely descended from the Amazigh peoples of the Maghreb. The frontier tactics that Castile developed on the Iberian Peninsula would be exported to these Atlantic islands before being perfected in the New World (Retamero and Torró, 2018). These seemingly disparate events were all part of one world-making process and were used almost exclusively for resource extraction. In the case of these islands, that resource was sugar. Sugar was not an indigenous crop to Madeira, nor the Canary Islands: the process of colonisation not only transformed social structures; it transformed the very soil and geology. Colonialism was a world-ecology.

While sugar cane was produced in al-Andalus, it always remained a marginal crop. It did not fit in with traditional peasant agricultural systems as it is an incredibly labour-intensive crop. Cuttings need to be hand-planted while the process of felling the cane is laborious and difficult. Sugar cane is an incredibly thirsty plant which creates its own problems in regions that lack much water. Perhaps the largest issue is that it needs nutrient-rich soil which it depletes very quickly. Sugar cane, therefore, was never a staple crop in al-Andalus or the wider Mediterranean.

Madeira and the Canary Islands transformed this reality. Portugal introduced slaves from the Maghreb to work on cultivating sugar cane, while Castile enslaved the local population as cheap labour to be exhausted. In 1469, Castilian Andalucía produced 10,000 *arobas* of sugar.² The Atlantic islands were operating on an

2 An *aroba* is a unit of measurement that was used in Iberia and Latin America. One *aroba* roughly equates to 25 pounds.

entirely different level. In 1507, Tenerife alone produced 69,000 *arrobas* of sugar, while Gran Canaria in 1502 produced an incredible 400,000 *arrobas*. After its discovery, *Hispaniola* continued this trend, being able to export 100,000 *arrobas* of sugar per year to Seville (García, 2018a).

In contrast to the centuries-long drift of regional primacy in premodern civilizations, these vital sectors were rapidly remade through successive frontier movements. In sugar, for example, one region after another quickly rose to world primacy (Madeira, São Tomé, Pernambuco, Bahia, Barbados, and onwards) only to see its competitive position erode, and new rivals climb to the top. (Moore, 2010b, p. 60)

The discovery of the Americas and 1492

The Escorial was built by Philip II of Spain and he was impelled by the fact that in his generation Spain had reached the apex of worldly power. She was the richest and most formidable nation on earth. From these rooms, Philip said, he ‘ruled the world with two inches of paper’.

Jan Morris

As the fifteenth century drew to a close, the stage was well set for the Age of Discovery to begin. The ever-expanding frontiers of the European world-economy had already pushed into the Atlantic islands, and regular trade with these colonies and with West Africa enhanced both the knowledge and capabilities of European seafarers. The ultimate prize remained Asia. The Portuguese were convinced that the route around the Cape of Good Hope offered the most promising pathway. Columbus, a product of the expanding maritime world of the Atlantic, shared with Breton, Flemish and English sailors the belief that Asia could be reached by sailing westward. It was Vasco da Gama, the Portuguese explorer, who reached Asia first by successfully navigating around the Cape of

Good Hope. Columbus, however, inadvertently discovered an even greater prize: the modern European ‘discovery’ of the Americas.

Events in al-Andalus and the Atlantic islands served as a prelude to Spain’s actions in the Americas. As soon as the chapter of the *Reconquista* closed, a new frontier opened across the vast expanse of the Atlantic; a new theatre in which Castile could flex its growing imperial muscles. The Atlantic islands functioned as the training grounds where the conquistadors honed their trade. Spaniards did not regard the discovery of the Americas as coincidence but rather as divine reward for eight centuries of effort; a prize bestowed for fulfilling their holy crusade against the infidels. The forced conversion of the Moors to Christianity foreshadowed the religious oppression later inflicted on the indigenous peoples of the Americas (Fernández, 2022). Santiago (Saint James) was a central figure for Spaniards and conquistadors. During the *Reconquista*, he became known as Santiago Matamoros (Saint James the Moor-Slayer); in the Americas, he was reimagined as Santiago Mataindios (Saint James the Indian-Slayer). Christian conversion and the broader evangelising mission thus became integral to the Spanish *raison d’être* in the New World.

Silver, agriculture and the economy

For the powerful emperor, for the wise king, this lofty mountain of silver could conquer the world.

During the long sixteenth century, the form that colonialism took in the Americas differed from that in Africa and Asia. In the latter regions, European powers were generally content to establish trading outposts: centres for the exchange of goods and commodities. While lucrative, this did not fundamentally transform the social structure of those societies. Crucially, the relative strength of Asia meant that the cost of reshaping these regions in the European image would have been prohibitively high. This was not the case with European expansion into the Americas, ‘whose importance loomed so large

because it incorporated vast new agrarian zones into the emergent pan-European world-economy' (Moore, 2003b, p. 328).

In Europe, the aristocracy had to contend with existing class forces. The peasantry had succeeded in abolishing serfdom in much of western Europe: in Normandy during the twelfth century, in England and France from the late fourteenth century and in Catalonia by the fifteenth century. In the Americas, however, the aristocracy was unencumbered by such social constraints and was able to mould a new agrarian social structure on its own terms. This culminated in the establishment of vast sugar plantations and the massive silver mines of Potosí and Zacatecas. In effect, the composition of class forces between peasantry and seigneurs in Europe contrasted with that in the expanding world-economy, which now incorporated the Americas as a periphery. These differing class dynamics shaped and altered the forms of class struggle that emerged.

One of the major consequences of European expansion was the discovery of rich gold and silver deposits, especially in Peru and Mexico. For more than a century, the *Flotas de Indias* exported immeasurable wealth from the Americas to Europe. Over the course of the sixteenth century, 74 per cent of the world's silver production came from the Americas and gold and silver bullion were accepted as currency throughout the Old World. The resulting influx of precious metals increased the liquidity of international trade (Cipolla, 2004, p. 229). This liquidity was especially important in commerce between Europe and Asia. Prior to the influx of American bullion, Europe possessed little that was of real value to trade for Asian spices. The silver now flowed eastward from the Americas through Europe to Asia, while commodities travelled in the opposite direction. So vast was this world-ecological transformation that, by the eighteenth century, New Spain's silver industry output surpassed the wood consumption rates of the English iron-making industry by a factor of three. 'This was the same industry that helped render England the least wooded country of the European forest zone by the end of the eighteenth century' (Studnicki-Gizbert and Schecter, 2010, pp. 95–6).

Spain grew intoxicated on the vast inflow of American bullion, succumbing to an insatiable hedonism. While the country became wealthier, this wealth destroyed any productive impulse that might have existed. The contemporary writer Francesco Guicciardini observed that Spaniards did not exert themselves in industry, but rather exported raw materials – such as wool and silk – only to buy them back as finished products from foreign manufacturers. The spectacular act of primitive accumulation meant that the Spanish crown could subsist and even thrive within the decay of feudal absolutism, having secured a plentiful income that lay outside the bounds of conventional revenue generation.

No other major absolutist state in Western Europe was to be so noble in character or so inimical to bourgeois development. The very fortune of its early control of the mines of America, with their primitive but lucrative economy of extraction, disinclined it to promote the growth of manufacturers or foster the spread of mercantile enterprise within its European empire. (Anderson, 2013, p. 66)

The world-system and 1492

By transforming the social structure of its newly acquired lands, Europe incorporated them into the European world-economy (Wallerstein, 2011a, p. 337).

The New World, after 1492, was gradually drawn – body and soul, past, present, and future – into the European sphere of action and thought ... Once America had made its entry to European life, it gradually altered all the deepest features of the Old World, drawing Europe's action in a new direction. (Braudel, 1992b, p. 387)

The year 1492 represented a conjuncture between two epochs. It gave the world a core and a periphery and helps explain why

capitalism became the dominant mode of production in the world-system. It provided Europe's fledgling capitalists with the capital and resources necessary to dissolve feudalism. 'Europe was now beginning to dominate the world and to lead the world in level and pace of development. The world's landscapes were now uneven. They have remained so ever since' (Blaut, 1992, pp. 355–6).

The incorporation of the Americas altered the international division of labour by geographically localising productive activities. Traditional manufacturing centres such as Flanders and northern Italy declined and became semi-peripheralised, as their goods became uncompetitive compared to the emerging core regions of England and France. England transitioned from a semi-peripheral exporter of wheat and wood into a manufacturing centre. Peripheries formed along the outer edges of this new division of labour: eastern Europe and the Baltic region became major grain exporters, with Poland providing wheat, while the Atlantic Islands and the Americas continued in their role as sugar exporters. The new cores – most notably the Dutch Republic and England – emerged as *entrepôts* for global trade. The rise of the Dutch republic owed much to the increased liquidity of trade, aided by the silver mines of Potosí, while the importation of grain from Poland allowed the Dutch to specialise in high-value goods such as shipbuilding (Moore, 2010b, p. 58).

Spain and Portugal, although instrumental in creating these new peripheries, were content to plunder the Americas and to pay for the import of manufactured goods from France and England, thereby becoming economically dependent. 'Their parasitical role and underlying poverty became suddenly apparent when they lost control of America. At the same time, they helped to strengthen the introverted and aggressive autonomy of the English and French centers' (Amin, 1980a, p. 90). This economic dependence ultimately obstructed the development of the Spanish state. It remained suspended between feudal absolutism and modern mercantilism. This stagnation prevented the emergence of a capitalist nation: Castile continued to collect tithes from its Atlantic holdings, while

Catalonia looked eastward toward the Mediterranean, even as the rest of Europe had turned its gaze westward.

Catalonia was saved from some of the decay that was corrupting Castile. Because the Americas were discovered in the name of Castile, the Crown of Aragón did not have trade rights with it. However, this also meant it could maintain its own trade barriers and protectionist policies. The autonomy of Catalonia and Valencia saved them from the havoc of the cycles of inflation and deflation that was taking place in Castile. Any minting of new coins was flatly resisted and the authorities of Catalan monetary policy refused to follow the lead of Madrid, understanding that an excess of bullion would lead to the uncompetitiveness of its export market. Catalonia became both excluded from profit and insulated from catastrophe. Considering the technological reality of the sixteenth century, this was the best outcome for Catalonia; commerce between the Mediterranean nation and the newly discovered lands would have been an impossibility. The *caravels* of Catalonia were unsuited to travel through the Strait of Gibraltar in a westward to eastward direction. Against the currents and against the wind, the risk of losing men and ships was too large. The technological revolution of the eighteenth century which brought the *focs* sails opened up the Americas to the Mediterranean. For example, Malaga, while being free to trade with the Americas since 1529, did not commence its trade with the Americas until 1778.

Spain of the seventeenth century

The seventeenth century represented the long and drawn-out decline of Spanish power, a period in which the great imperial optimism of the sixteenth century met the material contradictions of an empire increasingly unable to reproduce its dominance. Though Spain entered the century as the most powerful polity in Europe – its monarchy spanning continents, its silver fuelling the machinery of European trade – its internal structures proved increasingly unfit for the challenges of sustaining empire. The

centre could not hold. The very abundance that had once seemed its strength corroded the productive foundation of the Iberian economy, encouraging parasitism and rentierism over development and innovation. Spain's global position was not simply weakened by external rivalry, but was undermined from within by the structural fetters of feudal absolutism, ecclesiastical conservatism and an unreformed aristocracy disinclined to productivity. In the world-economy, Spain remained a central actor, but one whose momentum was increasingly historical rather than functional.

The seventeenth century opened under the rule of Philip III, whose reign marked the beginning of the decline of royal authority and the rise of *validos*: favourites who governed in the name of a monarch ill-disposed to daily rule. The duke of Lerma, Philip's *valido*, exemplified the corruption and indifference that would define the century. Patronage systems proliferated, the court grew bloated and governance became increasingly removed from the concrete needs of the realm. The expulsion of the Moriscos in 1609 further weakened the agricultural base of the south and east, depriving the economy of a vital labour force. This was done not for economic reasons, but to purify the religious character of the kingdom; an act in keeping with the post-*Reconquista* logic of a Catholic monarchy obsessed with orthodoxy at the cost of functionality.

Spain's structural weaknesses lay most profoundly in its internal economic geography. The Castilian heartland, which dominated the Spanish polity, was landlocked, semi-arid and economically regressive. Madrid, formalised as the capital in 1561, had been chosen for reasons of administrative centrality rather than economic dynamism. It lacked navigable rivers and lay far from productive agricultural zones. This precluded it from functioning as an *entrepôt*, resulting in a one-way flow of resources without reciprocal exchange. Rather than acting as an engine of economic growth, Madrid became a black hole for resources. Spain's infrastructure, organised around a 'radial road map' with Madrid at its centre, prioritised political and administrative control over economic efficiency and productivity (Germà, 2011, p. 692).

As such, the economy became overcentralised without becoming integrated.

This centralisation coincided with regional marginalisation. The geographically peripheral regions of the Iberian Peninsula – Catalonia, Valencia, the Basque Country – maintained distinctive economic and social structures, many of them more productive and commercially oriented than Castile, but they were subordinated politically. In Catalonia, grain shortages in the 1620s and 1630s produced tensions that would explode into revolt during the Reapers' War (1640–59), sparked by the burden of Castilian taxation and military requisition. The revolt ended only with the Treaty of the Pyrenees, which ceded part of Catalan territory to France, but it also marked a decisive moment in the internal fragmentation of the monarchy. Similar tensions played out in Portugal, which in 1640 successfully reasserted its independence after sixty years of dynastic union. The Habsburg crown, overstretched and internally incoherent, could no longer maintain the illusion of unity.

Meanwhile, in the wider European theatre, Spain's position as the hegemon of the previous century came under sustained pressure. Its involvement in the Thirty Years' War (1618–48) – fought in the name of Catholicism but largely driven by the dynastic interests of the Habsburgs – drained its finances and exposed its military vulnerabilities. The failure to secure a decisive victory and the fracturing of the Habsburg bloc revealed the limits of Spain's power. More damaging still was the growing naval and commercial rivalry with the Dutch Republic and England. The Dutch Revolt had already wrested the northern provinces of the Low Countries from Spanish control by the close of the sixteenth century, but the final recognition of Dutch independence in the Treaty of Westphalia (1648) formalised Spain's retreat from its imperial high-water mark. The Dutch, enriched by their role as *entrepôts* and financiers of world trade, eclipsed Spain in commercial relevance, while England's navy emerged as an increasingly assertive presence in Atlantic waters.

One of the greatest contradictions of Spain's position in the seventeenth century lay in the very nature of its imperial wealth. The bullion fleets continued to arrive, and Spain retained direct control over vast and resource-rich American territories. Yet the inflow of silver did not generate endogenous development. Instead, it inflated prices, encouraged luxury consumption and was often used to pay foreign creditors or purchase foreign manufactures. This dynamic, critiqued by contemporaries such as Martín González de Cellorigo, revealed the extractive and dependent structure of the Spanish economy. Spain possessed a global empire, but its economy became increasingly peripheral to the core processes of capitalist development. Its inability to convert imperial income into domestic transformation rendered it economically stagnant.

The result was an absolutism unmoored from productivity. The Spanish monarchy maintained its claims to universal empire even as its capacity to shape world affairs declined. The cultural expressions of this period – from the grandeur of El Escorial to the works of Velázquez and Cervantes – reflect a court and society conscious of their faded glory. The *Siglo de Oro* was as much a cultural response to decline as it was a continuation of imperial ascendancy.

By the end of the century, Spain was no longer the unchallenged centre of European power. Its absolutist structures had become brittle, its regional tensions unresolved and its global empire increasingly vulnerable. The death of Charles II in 1700, childless and feeble, brought the Habsburg line to a close, precipitating the War of Spanish Succession and the eventual transfer of the crown to the Bourbon dynasty. This marked not only a dynastic shift but a final admission of decline. The world-system had moved on: France, England and the Dutch Republic were now the leading capitalist powers, while Spain struggled to modernise under the weight of its own imperial past. The long seventeenth century had not destroyed Spain, but it had revealed the limits of empire without transformation; a lesson written in blood, paid for in silver, and taught across two continents.

Building the Spanish state

Spain, for so long a mere geographical expression, was somehow transformed into an historical fact.

J. H. Elliott

The transfer of power from the Habsburg line to the Bourbon dynasty after the War of Spanish Succession fostered a feeling that it was absolutely necessary to centralise the country along similar lines to France. The rise of regionalism during the reign of Charles II brought an atmosphere that was favourable to the abolition of differing regional regimes. Spain should become truly unified: with one monarch, one code of laws and one single administration. Spain and Spanishness had to be smelted and refined. It had to transform a country of widely diverging regions into a singular, purified element.

The Bourbon king Philip V took his native France as a source of inspiration. The realms of the Crown of Aragón – which had supported the claim of Charles of Austria during the War of Spanish Succession – had to be politically decapitated. The political privileges and ancient charters of Mediterranean Spain would have to be suppressed. Through the *Nueva Planta* decrees, Valencia in 1707, Aragón in 1711, Majorca in 1715, Catalonia in 1716 and Minorca in 1785 would now be ruled by the laws of Castile. The inland ports of Castile's custom houses were closed, and internal freedom from customs duties was established.

Equal laws were imposed and all subjects were placed under a common system. The courts of Aragón, Catalonia and Valencia were abolished, with their members summoned to the *Cortes* of Castile which now operated in the name of Spain. Administrative uniformity was introduced, with ministries of state, church, justice and war created in 1714. For the first time in its history, Spanish administration now had specialised personnel who were directly responsible to the king (Vives, 2015, p. 475). As the great historian of Catalonia, Pierre Vilar (1980, p. 568), wrote with regards to eighteenth-century Spain:

Every conflict between region and nation, between Catalonia and Spain, between the state and its provincial ‘vital forces’ seemed to be reduced. Nothing, at that time, foreshadowed future difficulties. Nothing recalled past battles. The brothers were reconciled, someone who likes images might say, around a table for once well spread. Remember that, precisely at this time, in the vocabulary of historians, economists and administrators, ‘country’ and ‘nation’, ‘nation’ and ‘state’ were not in conflict. The century invited talk of ‘patriotism’ and of the ‘republic’. It is impossible to find behind these abstractions anything except historic, united Spain, mistress of a great Empire.

These state-building initiatives continued into the nineteenth century. The civil guard was established, provincial administration was defined and railways were built. Their completion led to a massive 86 per cent reduction in transport prices (Martínez-Galarraga et al., 2015). This was accompanied by the completion of an integrated Spanish-wide economy. The Spanish Stock Exchange was created in 1831, a unified tax system was established in 1845, the Bank of Spain was formed in 1856 and a national currency – the peseta – was introduced in 1868. A class alliance of Catalan textile industrialists, Castilian agriculturalists and Basque iron industrialists dominated the politics of the nineteenth century. These reforms, for their part, were successful in the development of a Spanish state and a Spanish nation:

There is something in which both Spaniards and non-Spaniards certainly agreed by the middle of the nineteenth century: there was such a thing as a Spanish identity, a Spanish character, a Spanish ‘soul’ or ‘essence’, with very definite traits; the Spanish way of being was, in fact, one of the stereotypes most widely accepted among the European collective identities of that period. This international recognition concurred with a similar internal acceptance. Throughout the whole nineteenth century nobody seriously challenged the existence of a Spanish nation, the same as nobody challenged the unity of the Spanish State. (Junco, 2020, p. 95)

The Catalan economy

The removal of trade barriers between Catalonia and Castile and the technological advancement in Mediterranean naval production provided a major boost to Catalan commerce. The *Nueva Planta* decrees eliminated restrictions that had previously limited trade across Spain. Castile's overseas territories could now be exploited by the entire kingdom. Bourbon reformers introduced modernising economic ideas by establishing new chartered companies modelled on British colonial enterprise. Wealthy Basque traders founded the Caracas Guipuzcoana Company (which later merged with the Barcelona Trading Company) to monopolise commerce with Venezuela, particularly in tobacco and cocoa. The Barcelona Trading Company established links with Saint Domingue, Cuba, Puerto Rico and Hispaniola, and later expanded throughout the Antilles. As a result, exports from Barcelona increased tenfold in a single decade.

The opening of American trade to Aragón became a powerful incentive to accompany the coercive force of the *Nueva Planta* decrees. These reforms fundamentally modernised the Spanish economy and increased its productive capacity. Protectionist measures, such as the 1718 ban on Indian cloth imports, shifted demand. Raw cotton now arrived from the Americas and was woven and processed in the mills of Catalonia before being re-exported to the colonies. The increasing competition in textile production with France, the Dutch Republic and England helped drive broader industrial development in Spain and led to the eventual collapse of the older centres of textile production such as northern Italy.

Catalan enterprise was central to the integration of the Spanish economy. Like the Scots in Britain, the Catalans expanded across the Iberian Peninsula with a spirit of endeavour. Artisans, technicians and industrialists from Catalonia established themselves in all major Spanish cities. But it was Barcelona that witnessed the early rise of an indigenous bourgeoisie, grounded

in overseas trade and vineyard commerce. Commercial capitalism evolved into industrial capitalism, with investment in cotton and calico manufacturing. Mechanised looms arrived in 1780; steam-powered looms followed in 1844. By 1860, Catalan industry dominated 80 per cent of Spain's textile market. Far from being peripheral, Catalonia became the engine of Spain's industrial development. By the late nineteenth century, a quarter of Spain's largest corporations were Catalan. Industrial leaders, having captured the national market, sought to lead the Spanish nation, not a separate Catalan state.

Traditional guilds in Barcelona were transformed: they adapted into a manufacturing bourgeoisie or sank into the petit-bourgeoisie and working classes. This transformation depended on the emergence of a wage-earning working class. The textile industry introduced the first modern factories and shop floors in Spain, concentrating labour in unprecedented numbers. Class dynamics were shifting across Europe, and in Catalonia, with the onset of industrialisation. Seigniorial Europe was giving way to Industrial Europe – the Europe of the factory. The age of the aristocracy was waning; the new industrial era belonged to the worker and the bourgeoisie.

The fall of the colonies and the Catalan economy

Do not compare your material forces with those of the enemy. Spirit cannot be compared with matter. You are human beings, they are beasts. You are free, they are slaves. Fight, and you shall win. For God grants victory to perseverance.

attributed to Simón Bolívar

The long arc of justice began to make its way to the Americas in the early nineteenth century. The wars of independence in Spanish America were led by great liberators like Simón Bolívar. The Napoleonic invasion of 1808 in Spain and the Spanish War of Independence that followed left the Bourbon monarchy exiled and

discredited with its legitimacy across the Atlantic being weakened. By 1820, Spain's cacao interest in Venezuela and Colombia were lost. In 1823, the mines of Mexico had been abandoned, and by 1825, the great Peruvian mines were also lost. By 1826, all its continental American territories were lost. Cadiz and Seville became stripped of their commercial circuits and the import and export of colonial goods dried up. Ports that had once pulsed with imperial trade now fell into torpor. Spain was left with a rump empire in the Antilles and the Philippines.

For Catalonia, this was a sharp and painful shock. After the Bourbon reforms, Catalonia became a central cog in Spain's colonial economy. Catalan textiles and brandy had become staples in the Caribbean and in South America, and this colonial demand provided the original stimulus for the rise of Catalonia's industrial capitalist development. Profits from colonial trade were reinvested into the looms, mills and warehouses which peppered Catalonia.

The loss of these colonies meant that the shipments of tobacco and cacao which once flowed through Catalan firms were now channelled in the hands of the British, the French or merchants of the newly independent Latin American countries. The carefully built circuits of commerce that tied the Mediterranean to the Caribbean were broken. Catalans were outflanked as the middlemen of imperial commerce by the British in particular.

Cuba became even more important after the loss of the mainland colonies and became the site of intense Catalan activity. Catalan capitalists established sugar plantations, shipping enterprises, banks and commercial networks in Havana, Santiago and Matanzas. In Santiago – the largest Cuban port at the time – 70 per cent of merchants were Catalan. A third of Barcelona's overseas exports were going to Cuba while much of its banking and shipping capital was tied to the island. The Philippines – the gateway between East and West – and the great sugar plantations of Cuba meant that the blow of losing the mainland of the Americas, while painful, was not decisive.

The Catalan ‘rebirth’

The nineteenth century was a period of national regeneration for Catalonia. The *Renaixença* – literally, the ‘rebirth’ – marked the reawakening of Catalan language, culture and historical consciousness. It began as a literary and cultural revival in the style of the romanticist movements that were sweeping the continent in this period, but it became the ideological infrastructure upon which a modern Catalan national project could be built. It involved the reclamation and creation of cultural symbols, rooting Catalanism in the memory of the old Principality of Catalonia and the glories of the Crown of Aragón. This was a reference to a deeper, older, more submerged history which stretched from the Pyrenees across the Mediterranean to Sicily. It was a politics of historical reference, of continuity in rupture, seeking to draw a golden thread from the Crown of Aragón to industrial Barcelona.

A new-found love for Catalan in the public sphere developed; a language that had been neglected by the Catalans themselves for 200 years or so. The language moved from solely being the language of peasants to becoming a vehicle for high culture in the bourgeois circles of administration and law. This meant that the *Renaixença* was more than just a re-expression of culture, it was a political gesture. It was the reaffirmation that Catalonia was a nation with a language, a history and a destiny of its own. This national narrative, however, was not created in opposition to Spain, or implied rupture with it, but instead reaffirmed the importance of Catalonia’s place within its conceptualisation (Muro and Quiroga, 2004).

The *Renaixença* was driven by the structural transformation of the Catalan economy and society. Its industrialisation via the textile mills of Barcelona, the creation of railways and trading houses facilitated the emergence of a self-confident bourgeois class. This was not a dispossessed and deposed gentry that was hoping to resurrect a feudal golden age, but a class that had transformed itself, and now attempted to transform Catalanism,

within the new milieu of industrial modernity. In this regard, cultural nationalism was a response to the contradictions of the Spanish state; Catalonia was the industrial driver of modern Spain, yet was viewed as culturally inferior. The bourgeoisie sought a cultural identity that would match its material power.

The *Renaixença* was clearly stamped by the ambitions and needs of the class which produced it. The forces that destroyed the old *ancién regime* in Catalonia – the rise of steam, factories, cotton and railways – also created the conditions for a literate and urban middle class to develop. It was a bourgeois project whereby those same men that were enriched by the circuits of capital wanted to create an identity worthy of their new position. This reality meant that the *Renaixença* was not a revolutionary movement in terms of its class dynamics. It did not seek to overturn the natural order of things, but only to elevate the position of Catalonia within it. It was often socially conservative, which spoke of the *poble* in abstraction, but certainly did not include the workers and anarchists of Barcelona, nor the peasantry outside an idealised caricature in its conceptualisation.

The organised working class of Catalonia were mainly anarcho-syndicalist and generally viewed the national question as a secondary concern. There was a radical, passionately internationalist strand, which regarded any compromises with nationalism as heresy (Smith, 2020). The workers were scornful of the ‘petit-bourgeois chauvinism of the middle classes’, while the inclusion of roughly 200,000 non-Catalan workers in Barcelona meant that workers’ solidarity was usually expressed by class rather than nation (Vilar, 1980, p. 538). Ironically, the strength of syndicalism within the working class of Catalonia meant that the bourgeoisie leant on the Spanish state for protection from possible revolution (Medrano, 1994; Lecours, 2001). This stage of the *Renaixença* wanted to reaffirm the important position of Catalan industry within Spain, but it was not a call for political separation.

Ecology and labour

The industrialisation of Catalonia was not solely a question of factories and finance. It transformed landscapes, ecosystems, labour regimes and the social reproduction of every life to the demands of capital accumulation. The nation's entry into the industrial age required the restructuring of its ecological base. The state canalised the rivers, cleared the forests and opened the coal seams while the rural population was transformed into landless wage labourers. Industrial capitalism in Catalonia rested not only on the factory floor but on the ecological reorganisation of the countryside (Martínez-Alier, 1987; Moore, 2015).

Central to this transformation was the expansion of the textile industry in the nineteenth century. Its demand for hydropower led to the construction of canals and dams along the Ter, Llobregat, and other river systems. These rivers were embedded and central to peasant subsistence economies, but industrial capital re-engineered them for the continuous energy flow that water offered (Swyngedouw, 1999). New settlements grew around the textile mills and introduced some form of industrialism into rural Catalonia.

The workforce that powered these mills were drawn from the rapidly transforming agrarian economy. The Catalan peasant became increasingly proletarianised. Agriculture became specialised with the increase of monoculture and viticulture for export which displaced many of the smallholding and tenant farmers. This dislocation fed the new textile mills and the factories of Barcelona, fortifying its industrial class structure (Ringrose, 1996).

The ecological transformation of the Catalan landscape reproduced uneven development within the region itself. The mountainous and dry zones of the west and south were marginalised in favour of the riverine textile districts of the north-east. Urbanisation was concentrated, not generalised, and the creation of infrastructure followed the logic of capital rather than the needs of the population. It was the people that would have to move to fit in and satisfy the needs of capital; capital did not need to satisfy the needs of the

people. The ecological costs were borne by the peripheries and its rural population, while the surplus was centralised in the industrial and political hubs.

By the late nineteenth century, deforestation and soil exhaustion had begun to erode the agrarian base of the countryside. The hydrological balance of river systems was altered, leading to flooding in some zones and water scarcity in others. These ecological disruptions were not incidental but constitutive of the developmental path chosen. The logic of capital accumulation in Catalonia, as elsewhere, was indifferent to metabolic limits. It required only that nature be converted into labour, and labour into surplus (Moore, 2015; Hornborg, 2001). In short, the modernisation of Catalonia was a process of environmental and social enclosure. The land was reorganised to meet the needs of industry; the peasantry was reorganised to meet the needs of wage labour. What emerged was not simply a region of factories and cities, but a materially restructured ecology embedded within the capitalist world-system.

Empire, fascism and 1898

In 1898, Spain lost the last remnants of its once vast colonial empire. The Spanish-American War was a humiliating defeat for the Spanish, and the outcome was that Cuba became (nominally) independent and that Puerto Rico and the Philippines were also 'lost'.³ For the first time since the reconquest, Spaniards of all stripes now had to fall back on their own resources.

At home, these events were simply called *El Desastre* (The Disaster). This was a turning point in Spanish history. The loss of these economically important colonies stimulated political regional movements in Catalonia and the Basque Country. Before *El Desastre*, 'Catalans and Basques implicated in the colonial project defended and promoted the Spanish nation as fiercely as any Castilian'

³ Cuba did become independent from the Spanish but to all intents and purposes a neo-colonial relationship between Cuba and the United States of America then emerged.

(Schmidt-Nowara, 2004, p. 199). Merchant capital from these sources was important in fomenting the Catalan industrial revolution, and it was therefore in the interests of Catalan capitalists to remain part of Spain, as this granted them access to Spain's colonial possessions. The loss of the colonies meant that the Catalan bourgeoisie lost access to these markets and thus began to question the benefits of being tied to a weak central state incapable of quelling colonial rebellion and defending its interests from the United States (Mar-Molinero and Smith, 2020).

Not only did the possession of colonial empires have economic effects, but it also had sociological ones. These regions were sources of labour power, resources and markets, but they also meant prestige, power and status. In nineteenth-century Europe, to possess colonies was to be 'modern', industrialised and a 'Great Power'. In this regard, the United Kingdom and France were in a pre-eminent position, and this weighed heavily on Spain as well as the relative latecomers to 'nationhood' in Germany and Italy. In Germany, the need to 'catch up' with the colonial powers of France and Britain meant that the country colonised most of the as-yet 'unclaimed' regions of Africa, which included parts of present-day Rwanda, Tanzania, Namibia, Central African Republic, Chad and Nigeria. By the onset of the First World War, Germany had the third-largest colonial empire in the world. The importance the Nazis placed on *Lebensraum* was also a form of colonial expansion. In Italy, fascism and the push for colonial possessions went hand in hand. At 'home' in Europe, Italian irredentism strove to bring ethnic and Italian-speaking areas of other states under the wing of the newly formed Italian state. Abroad, Mussolini pushed to restore Italian dominance over *Mare Nostrum* (Our Sea); the name given to the Mediterranean by the Roman Empire. This culminated in Italy's fixation with attempting to conquer present-day Libya and Ethiopia.

The major difference between the Italians and Germans on one hand, and the Spanish on the other, was that the former countries projected their longing for colonies onto the future, whereas in post-1898 Spain, their status as a colonial superpower was irredeemably

relegated to the past (Storm, 2004). Spain had essentially become – and would stay – a second-rank power. This perception was cemented from the outside, as the loss of colonial territories led Lord Salisbury to proclaim in 1898 that Spain was a ‘dying nation’.

This led to a dialectical tension in the nation-building process in Spain: on one hand, it made the creation of a national Spanish *mythos* and consciousness increasingly untenable. This, in turn, pushed the upper and middle classes in the ‘periphery’, such as in Catalonia and the Basque Country, to look inward at their regional movements as a bulwark against a weakening Spanish state and an identity which relegated them to second-class citizens within the world-system. The end of the Spanish colonial enterprise meant that the ideological and economic ties that bound the regions of Spain together started to unravel. Catalan MPs of 1898 argued in parliament that if Spain had been a successful nation, there would have been no attempt or reason to bring the legitimacy of the state into question (Dalle Mulle, 2017, p. 23). These views were echoed in 1907 by the Catalan deputy Salmeron in the *Cortes*:

Think carefully. If instead of the colonial disaster, Spain had been victorious, if its colonial power had grown, if it had made the effects of a more extensive economic development felt in the internal life of the nation, if the Spaniard felt himself fortunate to belong to this nation – or to this state if you prefer – would we have seen this movement of protest from which ‘Catalan solidarity’ has finally emerged arise on the foundation that I have described? Surely not. (Vilar, 1980, p. 547)

This Catalanism was not homogeneous. It included both conservative regionalists who wanted more autonomy within Spain, and radical republicans who questioned the very legitimacy of the Spanish monarchy. But what unified them was the belief that Spain had failed. The loss of the colonies thus acted as a mirror. It reflected Spain’s decay, and Catalonia’s apparent difference. The dialectic between a rise in Catalan sentiment and national feeling on one

hand and the declining global power of the Spanish state via the loss of its colonies on the other was therefore inextricably linked.

The rise of Catalan nationalism

Imperial decline led to a re-articulation of what it meant to be Spanish and Catalan. There was a tension between a conception of Spain which was indivisible, and another that was plural which was an 'ensemble of diverse peoples, historic nationalities, and regions' (Moreno, 1997, p. 69). In the same way, Catalanness was experienced differently. Class position interacted with national identity. From 1900, the Catalan bourgeoisie were mainly represented by the Lliga de Catalonia; a political party that fought for bourgeois Catalan interests such as lower taxation on industrial profits. However, the Lliga was not in favour of Catalan independence, mainly due to its fear of the revolutionary potential of the Catalan working class (Medrano, 1994). The class and national interests of the Catalan bourgeoisie coalesced into a halfway position between inclination and aversion to the central Spanish state. The Spanish state may have been unpopular, but it was a safety net for the Catalan bourgeoisie, which could be used as a bulwark against its working class. In fact, in the tension between class and nation, the Catalan bourgeoisie decided that class was of primary importance to them. Primo de Rivera – who reigned over a period of dictatorship between 1923 and 1930 – was supported by the Lliga de Catalonia as he offered a reprieve and a means to restore order in the face of growing working-class agitation (Medrano, 1994; Dalle Mulle, 2017). The Lliga and the Catalan bourgeoisie 'had abandoned their ethnic identity in favour of capitalist concerns' (Ehrlich, 1997, p. 212). The Lliga was a traditionalist, anti-democratic party, yet one that saw itself as the motor for the industrialisation of Catalan and, by extension, Spanish society. When the Catalan bourgeoisie's own internal working class challenged these capitalist concerns, they found unity with their class, not nation.

The fact that Catalan capitalists had supported the side of reaction in the 1920s paved the way for a more egalitarian and left-wing Catalanism to be espoused for the first time. The republican nationalists of Catalonia actively opposed the dictatorship of Primo de Rivera and collaborated with left-wing political groups to restore democratic rule. The main political winners of the fall of Rivera's premiership in Catalonia were the *Esquerra Republicana* (The Republican Left). They decisively won the municipal elections of 1931 and called for the right to self-determination, as well as for workers' rights, welfare measures and agrarian reform (Medrano, 1994, p. 291). It was this process which created a more progressive Catalanism. Beforehand, Catalan identity was mainly weaponised by the Catalan bourgeoisie to improve their position in relation to Castilian capitalists. The dialectic between Spanishness and regional identities continued apace. The new radicalism of identities such as Catalanness meant that Spanishness – in reaction to the new-found strength of identity in the peripheries – moved towards authoritarianism. This authoritarianism was embodied within Francisco Franco, culminating in the Spanish Civil War.

The Spanish Civil War and fascism

Following the municipal elections of 1931 where republicans and socialists won an overwhelming majority not only in Catalonia but across Spain, Alfonso XIII departed the country. Though he did not formally abdicate, a provisional government was formed which culminated in the creation of the Second Republic and the creation of a new constitution. The Second Republic represented a coalition of uneasy partners and alliances. Communists, socialists, anarchists, regionalists and republicans bound together by their hatred of monarchy and reaction, but not much else.

The 1931 constitution represented a revolutionary break with the past. It declared that Spain was a democratic republic of workers of all classes. It finally divorced church from state. The constitution granted the vote to women, introduced divorce, civil marriage and

secular state education. For the socialists and republicans it was the harbinger of a new Spain. For the reactionaries and the right, which included monarchists, landlords, clerics and the military, it was Armageddon.

In a country where bishops once crowned kings, declaring religion a private matter was seen as an assault by the traditionalists. As an example of the church losing its dominant place in Spanish society, their schools were to be nationalised. For the rural poor and peasantry, which were still tied to the old ways of superstition, this was to be liberatory. More liberatory still was the proposed agrarian reform. In the south, the latifundia systems that had been reinforced in the *Reconquista* still existed and sprawled across Andalucía and Extremadura. Landless labourers continued to work the land in a system unchanged from feudalism. The 1932 Agrarian Reform Law aimed to break these estates and resettle peasants on the land. This process was hamstrung by the overcaution of bureaucratic action. Only a small portion of the 2 million landless peasants were redistributed land. This increased tensions between two classes: the landowners and the peasantry. The landowners clung to their old privileges, while the peasantry urged the reforms to go faster and deeper. Uprisings became endemic in the countryside. If the republic would not give them bread, the peasants would take it.

The original excitement which greeted the Second Republic gave way to continued regional tension. The Catalan question remained. Catalonia's *Estatut d'Autonomia* (Statute of Autonomy) was granted in 1932, offering a measure of self-government through the *Generalitat*. In the Basque Country, another autonomy statute was proposed, but blocked repeatedly by right-wing opposition. The tensions between a Spain that was one and indivisible, and one that was plural yet again raised its head. What was meant as unity through autonomy began to look, to both sides, as betrayal.

The military, humiliated by the loss of empire in 1898 and further weakened by the republic's army reforms began to plot. Officer numbers were cut, promotions frozen and religious processions banned in barracks. The generals saw their grip loosening and

resented civilian interference. As Spain polarised, they gathered their forces. Spain found itself in an interregnum. The old world was dying slowly, and the new world was struggling to be born. This was the time of monsters.

The victory for the Popular Front in the February elections of 1936 was the final straw for the Spanish military. In July 1936, united by their rejection of socialism, regionalism and working-class militancy, they instigated a military coup. The coup was supposed to be swift, but Spanish resistance refused to collapse so easily. The country fractured, the republic held Madrid, Barcelona and Valencia while a nationalist zone developed in the conservative strongholds of the north and west.

The republican zone was busy trying to build a new society. Workers' collectives were formed and factories became owned by those who worked them. International brigades came to the republic's defence, manned by volunteers from Wales, Ireland, France, England and America. But international solidarity could not make up for the republic's growing political isolation. The Non-intervention Pact signed by bourgeois democracies such as Britain and France starved the republic of arms while the cracks of the Popular Front began to show. Anarchists and communists began to turn on one another.

The nationalist zone on the other hand was not divided. It was disciplined. Franco united monarchists, Falangists, conservatives and fascists under his command and crushed dissent within his own ranks. The church gave its blessing, calling the nationalist cause a 'crusade', mirroring the early religious wars of the *Reconquista*. Whole towns and cities were made examples of. Badajoz, Malaga and Guernica were destroyed with German and Italian support. By 1939, the game was over. A country that had dreamed of democracy, agrarian reform and education now stood under the jackboot of reaction. Franco had won. Spain had lost. Franco's Spain would be one, Catholic and indivisible. The republic was dead. The state was his. And so began four decades of dictatorship, born not from the will of the people, but from the depths of reaction. The

Franco dictatorship brought unprecedented repression. Catalan was banned in public use, books were burned and the *Generalitat* was abolished. For nearly four decades the cultural and political gains of the *Renaixença* and its successors were erased from public life.

Franco viewed the *raison d'être* of his regime as 'the eradication of the twin evils of communism and separatism' (Medrano, 1994, p. 292). Under his rule, the Castilian language, identity and culture became the sole arbiter and lens through which Spanishness was viewed (Moreno, 1997). To complete this process, Franco relied on violence as well as cultural and linguistic assimilation to suppress regional identity.

The notion of unity was central to the Francoist ideology. The *Patria*, according to Franco himself, was 'spiritual unity, social unity, historic unity'. Catholicism was to be the 'crucible of nationality'. In this pursuit of unity, the state was to be central. It was through organised power that the nation would be re-made, and the people disciplined. This unity, imposed by the state, entailed an iron centralism which denied the existence of regional cultural differences. (Richards, 2020, p. 150)

In order to create this apparent unity, Franco promoted the idea that a unified Spain had existed from the time of the Catholic monarchs and the reign of Isabel I of Castile and Fernando II of Aragón (Travalia, 2022). Franco utilised national Catholicism as a propaganda tool, fusing the Spanish state with the Catholic religion. Isabel and Fernando, who had 'liberated' Spain from the Muslims, expelled the Jews and evangelised the American colonies was central to this national Catholicism.

This violent, overbearing nature of Spanish identity that was thrust onto the periphery had the counterproductive effect of re-awakening intense nationalist feeling in the most distinctive regions (Payne, 1991). Regional nationalism and popular mobilisation against the Francoist state therefore became fused: to be Catalan was to be liberal-democratic whereas a Spanish identity became

conflated with authoritarianism. It was as if to 'be Catalan' itself became an act of resistance against the central state. During the Francoist dictatorship, Catalanism was culturally peripheral. This was the first time that it could be stated that to be Catalan and to be Spanish could be viewed in direct contradiction to one another. Beforehand, Catalan identity had been used by political actors as leverage against the central state but these tensions hardly, if ever, led to direct conflict between Catalanism and Spanishness.

The Catalan economy under fascism

While dictatorship politically peripheralised Catalonia, economically it did not adversely affect Catalonia's economic position in relation to the rest of the Iberian Peninsula. Francoism needed to rely on the economies of Catalonia and the Basque Country to drive the Spanish state, despite their supposedly inferior identities and cultural traditions. Catalonia continued to experience impressive economic development during the dictatorship (Dalle Mulle, 2017, p. 35). Between 1960 and 1973, the Catalan economy's GDP grew an impressive 8 per cent a year and amassed an unequally large share of the foreign direct investment that poured into Spain (McRoberts, 2001). By the end of the dictatorship, per capita income in Catalonia was 30 per cent higher than the Spanish average. Catalonia accounted for 16 per cent of the population but 20 per cent of GDP and 26 per cent of industrial production (Giner, 1980). Despite intense cultural discrimination from above, Catalonia's position within the Spanish economic system remained unchanged. Catalonia, Madrid and the Basque Country continued to be the most dynamic regions of the Spanish economy with the more peripheral regions of Spain still being dependent on them for value transfers and surplus capital (Álvarez, 2003).

Catalonia remained overdeveloped relative to most of Spain. Cultural peripherality and a core economic position coincided in a highly asymmetrical situation. Despite internal repression, Catalonia continued to attract inward investment and have unequally large

shares of Spanish GDP. A core-periphery structure of GDP per capita in Spain had completely formed by 1930 (Rosés et al., 2010). The economic core of Spain was a triangular area with its vertices in Madrid, the Basque Country and Catalonia, with peripherality increasing the further one moved towards Portugal. Thirty-five years of dictatorship was not enough to undo the technological head-start that Catalonia had achieved in the nineteenth century. Regional differences and imbalances in Spain were stubborn, even in the face of political repression against those areas which were economically most advanced.

The return to liberal democracy: Catalonia in the world-system

The alternative to independence is decline.

Carles Puigdemont

When Franco died in 1975 and Spain transitioned to democracy, the legacy of the *Renaixença* returned to centre stage. The *Generalitat* was restored in 1977. A new Statute of Autonomy was passed in 1979. Catalan was made co-official and reintroduced into schools and public administration. The political dynamics of the Spanish state changed and democratised. However, economic differences seemed as stubborn as ever, with unequal regional income distribution actually worsening after Franco. Spanish accession to the EU exacerbated this issue. The locus of economic power in Europe is to the north of Spain. Catalonia's geographic location grants it easier access to key European markets, while all overland Spanish trade must pass through its borders.

In recent years the relative poverty of the southern and western Spanish provinces has increased and the spatial polarization of income at the beginning of the 21st century is more striking than ever. European economic integration can only reinforce this

tendency. Therefore, in the case of Spain, progress in the political and economic integration of Europe calls for the design of territorial cohesion policies aimed at counteracting the structural elements of economic regional inequality highlighted above. (Tirado-Fabregat et al., 2015, p. 24)

The economic priority of the new democratic regime was accession to the EEC, which required widespread deregulation, privatisation and the restructuring of public enterprises (Royo, 2002). In exchange, Spain gained access to cohesion funds, agricultural subsidies and regional development programmes. Between 1986 and 2006, Spain received more than €100 billion in net transfers from the EU, much of it invested in roads, ports and urban infrastructure. GDP per capita rose, and unemployment fell during the early 2000s. Yet these gains were unevenly distributed, and they masked growing vulnerabilities.

Spain's entry into the Eurozone in 1999 deepened its integration and removed key policy tools. Without control over monetary policy or exchange rates, Spain could not devalue its way out of imbalances. Low interest rates and access to European credit spurred a massive property boom, with construction accounting for nearly 20 per cent of GDP at its peak. This was not productive investment. Banks and households became overleveraged, real wages stagnated and industrial capacity shrank. The Euro institutionalised Spain's peripheral status by locking it into a monetary regime designed around the needs of northern Europe.

The 1978 Spanish constitution created a new territorial framework after nearly four decades of dictatorship. The *Estado de las Autonomías* (State of Autonomies) was designed as a compromise between centralist and federalist demands: a decentralised system of governance that granted regions administrative authority without full sovereignty. The 1978 constitution recognised 'nationalities and regions', but stopped short of declaring Spain a plurinational state (Moreno, 2001). Seventeen autonomous communities were created, but not all were equal. The Basque Country and Navarre retained

fiscal autonomy through the *cupo* system, while Catalonia received expanded cultural and educational competencies. This meant that revenue transfers from the relatively wealthy Basque Country and Navarre to the relatively poor Spanish south does not take place (Gray, 2015). The low contribution made by rich *foral*⁴ regions to the central solidarity fund is a major weakness in reducing inequality in the Spanish system (Bristow, 2009). Catalonia does not have the same fiscal framework as the Basque Country and Navarre, and this is one of the biggest points of contention between Catalans and the central state. Catalonia does not have fiscal autonomy, but accounts for 16 per cent of the Spanish population and 19 per cent of Spanish GDP. Its GDP per capita is about 20 per cent higher than the Spanish average. Both Catalonia's purchasing power parity and GDP per capita are generally higher than the EU average, whereas Spain is below the EU average on both measurements (Castells, 2014). By analysing the GDP per capita of Spain's regions relative to the EU average, we see that between 1995 and 2019, Catalonia's low was 99 per cent of the EU average and its high was 115 per cent. Only six of Spain's twenty-one regions reached 100 per cent of the EU average at any point in this period.

The continual strength of Catalonia's economy relative to the rest of Spain is impressive. From 1860 to 1995, Catalonia stayed in the top three ranking positions for GDP per capita in Spain (Martínez-Galarraga et al., 2015). Since 1995, this situation has remained stable. Catalonia was in the top four positions for all but one year, when it was in fifth position. The Basque Country's and Navarre's positions in second and third place highlight two points. First, it shows why Catalonia would want the same economic agreement as these regions as it helps them maintain their privileged economic positions. Secondly, it illustrates why the Spanish state would be averse to such a situation, as it would lose another source of income to fund government activities as well as its redistributive power to poorer regions (Boylan, 2015).

4 Local government.

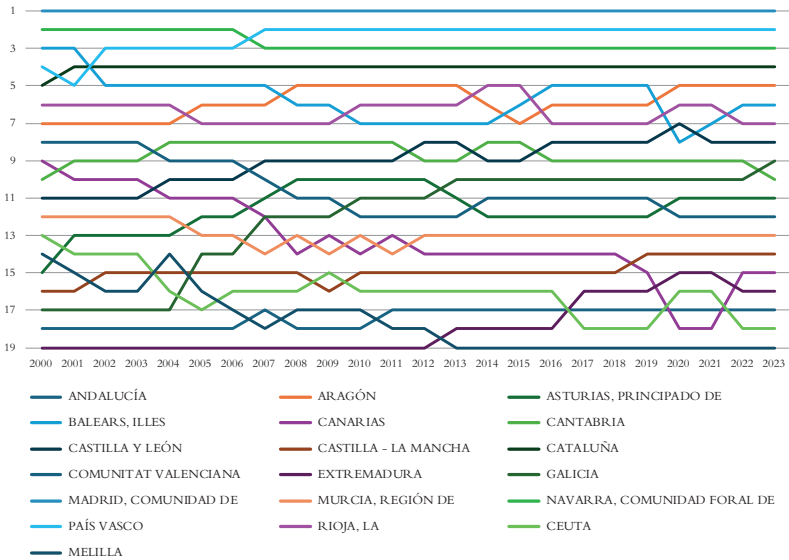


Figure 5: GDP per capita ranking – Spain 1995–2019 (author's own).

Recent years have seen an upsurge in support for Catalan independence. It has been assumed that the reasons for this stem from the cultural differences between Catalonia and the rest of Spain. However, since the fall of Francoism and the reinstatement of Catalonia as an autonomous community in 1978, calls for secession and even a ‘Catalan-only’ identity have been relatively weak. As recently as 2001, it was shown that Catalonia lagged behind the Basque Country, the Canary Islands, Navarre and Asturias in holding a regional-only or more regional-than-Spanish identity (Lecours, 2001). One would not, therefore, expect that calls for secession would be strongest in Catalonia of all parts of Spain. Identity interacts with politico-economic considerations, where its salience waxes and wanes depending on the current material reality. This material reality is linked with the international situation and the position of a given place within the world-system. Catalan identity in terms of secessionism first became salient after 1898, when a change in Spain’s location

within the world-system meant that membership of the state was no longer viewed as a net benefit. Identity, therefore, became a protective mechanism against the weak Spanish economy. Conversely, membership of the Spanish state post-1978 was beneficial to Catalonia as it more easily granted entry into the European Union. Within the EU, Catalonia could reorientate its economy towards the European core and away from the rest of Spain. Here, a Catalan identity – fused with Europeanness – was used to exploit new economic opportunities. Why, therefore, has there been an increase in support for independence in the last decade or so? This new reality cannot be disentangled from the financial crisis of 2008, the Spanish state's semi-peripheral position in the EU, Catalonia's stronger position within the system, and the Spanish state's reliance on taxes from Catalonia to fund government projects.

The 2008 financial crisis hit Spain particularly hard. The collapse of the property market triggered a banking crisis, mass unemployment and sovereign debt concerns. Youth unemployment rose above 50 per cent, while public debt soared. The Spanish government imposed austerity measures under EU pressure. The European response was technocratic and punitive. Bailouts came with conditions such as mandated structural reforms and labour market deregulation. EU funds were intended to promote convergence, but in practice they often reinforced regional inequalities. The richest regions like Madrid, Catalonia and the Basque Country became more globally integrated, while others became dependent on subsidies and low-wage service sectors. Rather than correcting historical disparities, EU integration layered new forms of dependency onto old ones. Spain remained a semi-periphery: central to Europe's political architecture but economically subordinate to its fiscal and monetary core.

In Spain, taxes are collected centrally by the Spanish government and then remitted back to the regions. Taxes and government revenues are transferred to those regions that are

relatively more in need, rather than on a population basis.⁵ Under this system of attempted fiscal equalisation, rich regions like Catalonia support poorer ones. Catalonia raises 19 per cent of the central government's tax revenue but receives only 14 per cent of the state's revenue. This has created a situation in which many Catalans feel resentful and want more of their tax revenues to stay in Catalonia. Secession, in this regard, can be viewed as a way of ensuring the end of the 'subsidisation' of poorer regions within Spain. Catalan independence is a function of grievances over fiscal policy, with the theoretical understanding that Catalonia wants to retain its wealth rather than subsidise other regions in the country suffering from poorer economies (Boylan, 2015). In surveys analysing the reasons behind support for Catalan independence, economic reasons prevail. For example, '63.5% of respondents supporting independence mentioned welfare reasons, while only 25.4% mentioned issues related to the national conception of Catalonia or their feelings of "Catalanness"' (Serrano, 2013). Similarly, in surveys conducted between 2010 and 2015:

to the question 'What do you think is the most important problem of Catalonia?' the largest group has responded 'unemployment and job precariousness' (with a 46% average). 'Relations Catalonia-Spain' always comes in fourth place (with a 19% average), after 'dissatisfaction with politics and politicians,' and 'the working of the economy'. Furthermore, in a most recent survey: 'What is the main motivation for you to have become independentist in the last few years?' 'Catalan language and culture' was the answer of only 2.5%. (Colomer, 2008)

Independence-oriented Catalan political parties have also centred the debate around economic arguments, rather than focusing on cultural matters. Both the *Esquerra Republicana* and the right allude

5 In the United Kingdom, welfare payments are not Barnettised but are paid out on a basis of relative need as well. However, most government transfers in the form of education, housing, healthcare is based on spend in England and relative population.

to Catalans being ‘robbed’ by the central Spanish state, despite the fact that it is Madrid itself which ‘loses’ most from the policy of state transfers (Dalle Mulle, 2017). Some form of progressive tax revenue transfers is to be expected in modern states; the claim that Catalonia is being ‘robbed’ rather than paying according to its ability and the needs of others is not convincingly made. The secessionist movement in Catalonia is linked to both the unequal economic reality between it and southern Spain, and their differing positions within the world-system.

Spain as semi-periphery

Within the global division of labour, Spain satisfies the indicators of a semi-peripheral country as outlined in our theoretical chapter.⁶ The functions of a semi-peripheral country are as follows:

- A mixture of both core and peripheral economic activity, playing an intermediary role between the two;
- A geographical location that is spatially situated between the core and the periphery;
- An intermediary through which activities of the core and the periphery are completed;
- Provides an outlet for capital investment from the core into lower-wage industrial production.

Spain’s position as a semi-peripheral country is best exemplified by its relationship with Latin America on one hand and Germany on the other. Each function will be considered in turn with these specific relationships in mind.

Spain’s economic structure reveals a mixture of both core and peripheral economic activity. Spain has a large travel and tourism

6 It is possible that with the inclusion of the Basque Country and Catalonia, Spain could be at the cusp of the core, however, the purpose here is to show that entry into the Spanish state does not grant these places with a core position; it is these places that improve the position of Spain, not vice versa.

industry, which is generally considered a peripheral economic activity. While tourism can help grow an economy, it does not necessarily lead to its development. Long-term reliance on tourism often replicates and reinforces patterns of dependent economic development (Chaperon and Bramwell, 2013; Britton, 1982, 1987, 1991; Fletcher, 2013). Spain also has a substantial car/motor parts sector, typically seen as a core activity. However, this sector may involve low-paid, 'unskilled' work on production lines, which does not necessarily equate to core activity. Additionally, Spain has a pharmaceuticals sector, likely a core activity, while the exportation of foodstuffs tends to be peripheral. Although detailed data for a more nuanced analysis is lacking, the general trend indicates a mixture of core and peripheral economic activities.

Secondly, the Iberian Peninsula's cultural and geographical location between Latin America and the core of Europe is a semi-peripheral indicator. Spain straddles both the European and Latin American worlds, sharing cultural elements with the European core, such as Germany, and also a cultural and linguistic affinity with Latin America. Both regions share a common language, similar roots in legal and educational systems, and the importance of family businesses and informal institutions. At the same time, EU accession has meant that Spanish institutions conform to European standards, with many institutional-level political, social and economic policies determined by centralised European authorities (Martinez and Jareño, 2014).

Thirdly, Spain acts as an intermediary through which core and peripheral activities are completed, particularly in the banking and telecommunications sectors. By 1999, Spain's financial system was the second largest supplier of funds to Latin America, providing 14 per cent of the total, with the USA leading at 22 per cent (Sebastián and Hernansanz, 2000). Spain's expansion into the banking sector involved both direct investment in Latin America and the establishment of Spanish banks there, such as Banco Bilbao Vizcaya Argentaria (BBVA) and Banco Santander Centro Hispano

(BSCH).⁷ These banks became the two largest foreign banks in Latin America. Additionally, Spain expanded its presence through the acquisition of Latin American banks. By 2005, BBVA and BSCH managed \$270.6 billion in customer funds in Latin America (\$125.2 billion and \$145.4 billion, respectively), a figure 28 per cent greater than Argentina's GDP that year. They had 36.9 million retail banking customers (16.6 million for BBVA and 20.3 million for BSCH) and employed 124,350 people (61,604 at BBVA and 62,746 at BSCH). Notably, 43 per cent of BBVA's net profit and 32 per cent of BSCH's came from their Latin American subsidiaries (Toral, 2008, p. 518).

Spain also served as an outlet for German banks seeking substantial profits, mainly through investments and loans in the Spanish housing sector. In the pre-crisis years, foreign capitalists invested an average of €7 billion annually in Spanish property assets (López and Rodríguez, 2011). By 2009, German banks held over €240 billion in outstanding loans to Spain (Thompson, 2015).

Regarding Foreign Direct Investment (FDI), by 2006, Spain accounted for 40 per cent of all European FDI in Latin America, predominantly in the telecommunications sector (Galán and González-Benito, 2006). As late as 1990, *Telefónica* – a Spanish telecommunications company – had no customers in Latin America. By 2005, this number had surged to 98 million, representing over half of the company's total customers. Similarly, European core states used FDI to acquire Spanish companies. Following Spain's accession to the European Community, 'German, French, and Italian multinationals took up key positions within Spain's production structure, buying up most of the large food-industry companies and the public-sector firms being privatised, taking over much of the supermarket sector, and acquiring what remained of the major industrial companies' (López and Rodríguez, 2011, p. 7).

This situation illustrates Spain's dual role as both exploiter and exploited. By the turn of the century, nearly 80 per cent of FDI

7 Both Banks are Basque rather than Spanish, thus without its political 'peripheries' the position of Spain would worsen even more.

into Spain originated from within the European Union, while only 16 per cent of Spain's FDI went to the rest of the EU, with the remainder directed to Latin America (Sebastián and Hernansanz, 2000). Spain can be described as a 'springboard country', where multinational corporations (MNCs) from third-party countries use their subsidiaries in Spain as a gateway to other markets, leveraging the cultural, linguistic and social similarities between Spain and the final destination. 'The problems German business managers face in Latin America are not encountered by their Spanish counterparts', which implies that 'German firms use their subsidiaries in Spain to manage their activities in Latin America' (Pla-Barber and Camps, 2012, p. 521). This analysis supports the view of Spain as a semi-peripheral country within the world-system.

Catalonia as core?

Catalonia occupies a position between a semi-peripheral and a core region within the world-system. Its current association with a semi-peripheral state limits its ability to attain a truly core status. Independence, therefore, represents a means through which Catalonia could enhance its position within the world-system. The reorientation of the Spanish economy towards western and northern Europe since the end of Francoism has diminished the importance of the Spanish market to Catalonia. Barcelona is looking outwards, northwards, over the frontier, to where 'development' and 'prosperity' comes from. Previously, the Spanish economy provided access to external colonial markets and a substantial domestic market for Catalan products. Post-Francoism, integration within the Spanish state facilitated easier access to European markets through EU membership. However, since the advent of the Eurozone and the intensification of Spain's unequal position in the world-system post-2008, remaining within the Spanish state has become less attractive. An independent Catalonia could still trade with the rest of Europe and retain the same currency. Catalonia is actively shifting its economic focus towards northern and western Europe, evidenced by

a 16.4 per cent decline in the share of the Spanish market in Catalan exports between 1995 and 2011 (Castells, 2014).

The eastern enlargement of the European Union has also altered the economic role of the southern peripheries (southern Spain, Portugal, southern Italy, Greece). The EU now has an abundance of peripheries, reducing the significance of the southern peripheries within the world-system for European core states. This shift is compounded by the eastern periphery's generally higher educational attainment and stronger industrial structures, a legacy of the socialist system's emphasis on these factors (Caraveli, 2017). Additionally, the eastern periphery is geographically closer to the core of Europe, leading to a displacement of southern periphery exports by those from the east. This shift has replaced imports from the south with those from the east, particularly in sectors related to the German manufacturing core (Gräbner and Hafele, 2020). The core has benefitted from new low-wage labour markets, while the southern periphery has faced increased competition and a reduction in structural funds. The north-east of Iberia, with its relatively core position compared to the southern periphery, has not been in direct competition with the new eastern peripheries.

Overall, this shift has reduced the costs of exit and increased the potential gains from secession. National sentiment, while crucial, is not sufficient on its own to make secession feasible. Catalonia is at the fringes of Europe's core, both geographically and in terms of its significant export share to the rest of Europe compared to the rest of Spain. Catalonia also attracts a notable percentage of foreign investment that comes to Spain, illustrating its role as an outlet for capital investment from the core. Additionally, Catalonia experiences net inflows of migrants from other parts of Spain while simultaneously losing highly skilled workers to the European core (Bonifazi and Crisci, 2020). Catalonia's efforts to improve its position within the world-system highlight its belief that leaving a weak state could be a key strategy to achieve this goal. In this context, Catalonia exemplifies Tom Nairn's concept of an overdeveloped region (2021, p. 169):

But there are also several regions whose key problem has been determined in a wholly different fashion [to underdeveloped regions]. They occupy a different location altogether in the general history of the economic development process. These are the areas whose problem is that they developed more rapidly and successfully than the territory surrounding them. They have never been ‘relatively overdeveloped’ in relation to the European core-areas of industrialisation, of course – the Ruhr, the English Midlands, and so on. But they have been so in relation to the larger states dominating them politically. They became dynamic, middle-class enclaves in a more backward country – capitalist societies struggling to be free, as it were.

Conclusion

The long arc of Spanish history shows its key role in constructing a global order which rendered its own economic model and social structure obsolete. The mountain of silver at Potosí, the discovery of the Americas and its central role in the expunging of Muslims from Europe ironically created the conditions for its own marginalisation. In this regard, what we have seen is a dialectic between the power of Spain on the one hand, and its weakness on the other.

The conquest of al-Andalus created the conditions for a new social structure. One where the landed nobility became entrenched in a frontier society, where the church grew fat on plunder and a state that was always geared for war. The later conquest of the Americas reproduced these forms at continental scale. Yet, despite the vast reach of the Spanish crown, the productive base of Iberian society remained unchanged. The peasantry remained bound to the land, and a bourgeoisie could not develop under the thumb of the rentier elites. The influx of bullion from the Americas disguised the rot within. It allowed the Spanish state to persist longer than its internal economy could sustain and allowed nobles to avoid investment. The Spanish world-empire was a colossus with feet of clay.

As new global cores emerged in Amsterdam, London and Paris, Spain continued to orient itself around pre-capitalist forms of extra-economic coercion. It failed to construct the institutions that could universalise commodity production, discipline labour through the market or mobilise surplus toward reinvestment. While Spain discovered the New World, it would not be hegemon in the new world-system. The task fell to those who followed, who learned from Spain but applied new social foundations based on a capitalist logic.

Catalonia's story within Spain illuminates these contradictions. It was a zone of early urbanisation, with a strong commercial and proto-industrial capacity. Catalonia's model may have offered a different developmental path, but its elites wavered between resistance and compliance. What Spain reveals is the difference between imperial conquest and systemic change. It is not empire that makes a capitalist nation, but the ability to restructure land, labour and life toward the production of surplus through the market. Spain constructed a global system it could not dominate. Its wealth delayed reform, its church stifled critique, and its aristocracy defended forms of rule incompatible with the world it had helped to create.

Spain's history is global. It ruled distant lands and embodied the contradictions of transition to a capitalist world-economy. It is instructive of the birth pangs of creating a new world. Today, Catalonia's push for self-determination must be seen not as a sudden rupture, but as the latest expression of a centuries-long dialectic. They are the latest chapters in a much older story. They are the echoes of a geography that both divided and unified, and of an empire than expanded before it had truly been integrated. It reflects not only political disillusionment, but the accumulated legacy of economic, social and cultural divergence. The Spanish state continues to grapple with its own incoherence as a state that was never fully consolidated, yet uncomfortable of its own natural plurality. To understand Catalonia and Spain, then, is to understand the very architecture of modernity, and the enduring struggle over how history, identity and power are configured in space.

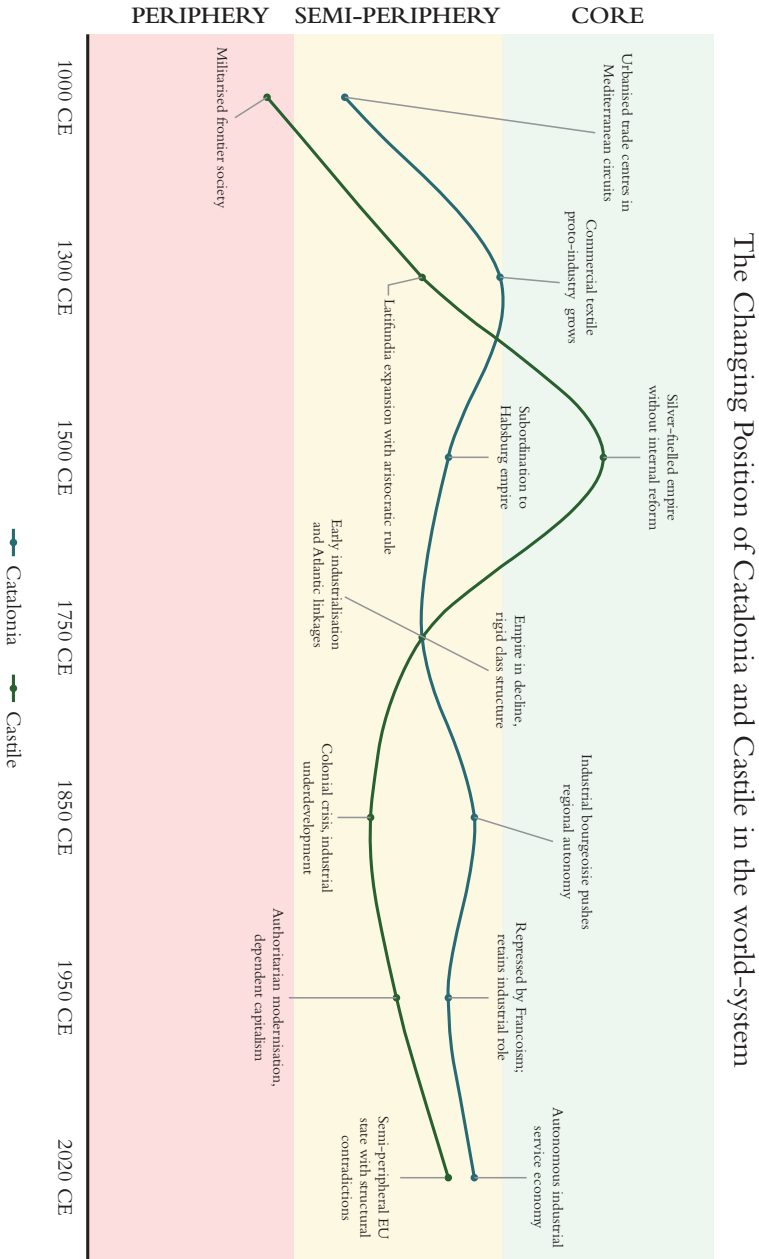


Figure 6: The changing position of Catalonia and Castile in the world-system (author's own).

THE MEZZOGIORNO, PADANIA AND ITALY

*Italia! O Italia! thou who hast
The fatal gift of beauty, which became
A funeral dower of present woes and past,
On thy sweet brow is sorrow plough'd by shame,
And annals graved in characters of flame.*

Lord Byron

The story of the Italian peninsula is not one of linear progress. It was a space where the early possibility of capitalism shimmered without becoming fully formed. Its city-states dazzled with commerce and finance but fundamentally remained within their feudal shell. Political fragmentation persisted despite (or perhaps because of) its cultural brilliance. Italy was a mosaic of polities and gives an opportunity through which to view the spatial, political and economic constraints of both national unification and economic development in the world-system. This approach resists national teleology or of viewing Italian history solely as a failure to unify.

This story is one of the interplay between geography, labour and class. It examines how the peninsula's fractured topography structured its political divisions, how maritime circuits embedded its cities into broader imperial economies, and how the north's commercial expansion depended on the continued agrarian immobility of the south. Italy is thus situated as a space whereby the north moved from the core to the semi-periphery of the world-system, while the south moved from the semi-periphery to a

The Mezzogiorno, Padania and Italy

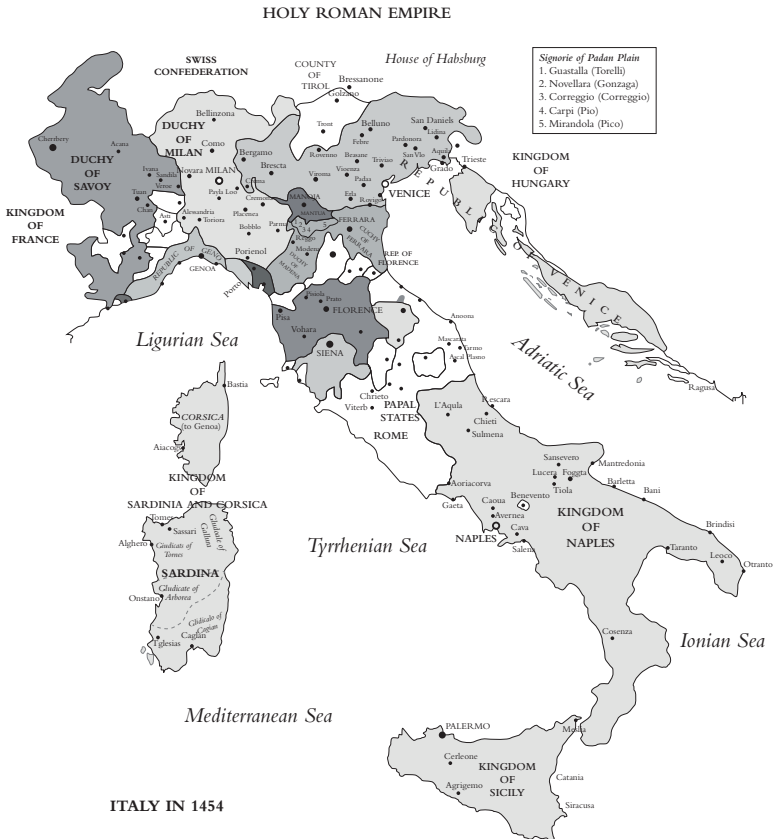


Figure 7: The Italian peninsula in 1454 (Lazzarini and Gamberini, 2012).

position akin to peripherality. It is a zone of intermeditation: uneven development is central to its history.

In the case of Italy, geography is more an actor than a backdrop. The division between the fertile Po Valley, the mountainous Apennines and the fractured south created deep ecological and logistical obstacles to political unification and economic integration. Urbanism in the north flourished within these constraints, leveraging maritime access to sustain enclaves of financial power. Yet these same cities lacked the capacity to restructure the agrarian world from which they drew sustenance. The hinterlands

remained subsistence-oriented, governed by aristocratic rentiers or ecclesiastical landlords. The rural-urban divide was both spatial and structural. The cities depended on the countryside, and the maintenance of a dualistic structure made sense to the oligarchic elites of the city-state. The Italian communes – capitalist in outward appearance – stood atop a feudal society. The power of the guilds, the privileges of landowners, the immobility of peasant labour all served to limit the generalisation of capitalist logic.

Crucially, this chapter also asks how Italy's position within the broader world-economy shaped its internal limits. The Mediterranean, once the axis of Eurasian exchange, declined in strategic importance as the Atlantic economy rose. The expansion of northern Europe's capitalist states reshaped global flows of bullion, labour and production. Italian cities, which had flourished as intermediaries in a Mediterranean-centred world, found themselves bypassed. Their fleets were ill-suited to oceanic trade while their banking houses were overexposed to imperial defaults. Their markets remained too small and fragmented to compete with the newly unifying national states. Italy became semi-peripheralised by systemic shifts in the world-system as much as by internal contradictions.

Using the world-system as our unit of analysis, this chapter considers not only why capitalism failed in Italy, but why it emerged elsewhere. Why did the north-western Atlantic arc achieve the transition from feudalism to capitalism, while the Italian peninsula did not? This is a question of position. In world-systems terms, Italy reached the ceiling of what was historically possible within the commercial circuits of its time. Beyond that ceiling lay the Atlantic, and a form of accumulation that no Italian polity could dominate. The rise of capitalism elsewhere made Italy's path both contingent and marginal.

This chapter offers a critique of developmental assumptions and an argument for structural analysis. It demonstrates how brilliance can coexist with stagnation and how commerce can exist without the existence of capitalism. In tracing the *longue durée* of the

Italian peninsula – from Roman legacies and city-state oligarchies to colonial ventures and passive revolution – we see the profound contingency which shapes development.

Geography

Italy is a land of fractures whose geography does not lend itself to unity. From the alpine ridges of the north to the sunburnt plains of the midday sun in the south, it is a country defined by segmentation. The spine of the Apennines runs the length of the peninsula, dividing east from west, while the fertile Po Valley opens out toward the north and the transalpine world. Its coastline, long and jagged, offers no single axis of orientation. Instead, Italy looks outwards in every direction: to the Adriatic, the Tyrrhenian, the Ionian, the Ligurian, and across them to Greece, Africa and Spain. This fragmented topography has long structured the forms of its settlement, agriculture, politics and commerce. Over the *longue durée*, geography in Italy was one of its principal drivers: shaping and limiting the trajectories of political centralisation, economic specialisation and cultural integration.

The Po Valley in the north of the peninsula forms Italy's only significant area of fertile, contiguous lowland. This region, bounded by the Alps and drained by the Po River, allowed for intensive agriculture, dense population and relatively easy communication between cities such as Milan, Verona, Bologna and Venice. The Po Valley became the grain basket of the communes and later the industrial heartland of the Italian state. The proximity to Alpine passes facilitated trans-European commerce and cultural exchange, connecting Italy to the transalpine world. This region developed in tandem with the economic rhythms of Flanders and southern Germany (Braudel, 1995a).

The centre, by contrast, remained ecclesiastical and symbolic. Rome, once the heart of an empire, reimagined itself as the capital of Christendom. As the Western Roman Empire fell into disarray, so did its hinterland. The *Campagna Romana* was marshy, difficult to

cultivate and fertile breeding ground for malaria. This left Rome politically important but economically peripheral. Its power relied more on spiritual legitimacy than economic strength.

The south was a mosaic of cultures and climates. Its rugged interior contrasted with fertile coastal plains, while the island of Sicily stood as a world apart: a crossroads of Mediterranean civilisation. Geography facilitated this pluralism. The proximity to North Africa, Greece and the Levant made the south more susceptible to foreign influence but also more integrated into wider maritime circuits. Its cities – Palermo, Bari, Salerno – were ports of exchange as much as centres of rule.

Agriculture and the movement of the fruits of the earth had always been the greatest source of wealth of Campania. The fertility of the plains was encouraged by its temperate climate and its water abundance, but was also a consequence of the volcanic nature of the soil which was enriched by the activity of the south's mountains of lava. This reality meant that since at least the times of the Romans an intensive agricultural system existed which could support a large population (Sakellariou, 2011, pp. 64–8).

The Apennines form the spine of the peninsula, dividing it and creating significant barriers to east-west communication. The jagged coastline of Italy shaped the development of port cities and maritime republics. The Ligurian and Tyrrhenian coasts favoured Genoa, Pisa and Amalfi, while the Adriatic gave rise to the city of the lagoons and its empire. These maritime cities became nodes of trade that linked Italy with Byzantium, the Islamic world and the Crusader states. Their wealth did not mainly come from production, but derived from brokerage, banking and navigation. The sea in this regard was an opportunity, not a limit (Abulafia, 2011).

Over the *longue durée*, Italy's geography has been both a blessing and a constraint. It encouraged localism, fostered cultural richness and embedded the peninsula into broader world-systems. Yet it also rendered centralisation difficult and unity elusive. The mountain passes that allowed commerce also enabled invasions; the seas that brought trade also brought conquest. 'Italy was always too full, too

rich, too open to the world to be easily subdued or easily unified' (Braudel, 1995b, p. 37). To understand Italian history is to take geography seriously. The landscape dictated not only the boundaries of political power but the terms of social life, the rhythms of trade and the routes of empire. From the Roman roads to the trade routes of the maritime republics, Italy's geography was never passive in its development. It structured possibility, conditioned development and set the limits and potentialities of power.

The Roman foundations of Italy

While the governance of the Western Roman Empire collapsed in the fifth century, the peninsula remained imprinted with an infrastructure and institutional framework passed down from Roman domination. The old land regimes established under Roman rule continued to affect the historical trajectory of the peninsula. The latifundium system of large estates worked by dependent labour remained entrenched in the south. While the legal framework of land ownership changed under Gothic, Lombard and Norman control, the underlying structure of land concentration and elite extraction remained intact (Wickham, 2005). Over the *longue durée*, agrarian inequality and the weak position of the southern peasantry would remain.

Meanwhile, Roman legal traditions left their imprint in the north and centre. The *civitas* was the name given to the city as a unit of legal and political authority. This provided the ideological and legal foundation for the rise of the medieval commune. The city-states framed their civic identity in terms of their Roman ancestry, whether real or imagined. Roman republicanism justified self-rule, while contract regulation, property rights and civic administration was passed down from Roman jurisprudence (Jones, 1997). This legal inheritance gave the urban elite tools with which to extract a surplus and institutionalise oligarchy in the name of civic republicanism.

Italy and the Carolingian Empire

The disintegration of the Western Roman Empire led to the integration of northern and central Italy in the Carolingian world-empire. Lombardy was brought under Frankish control following Charlemagne's campaign in 773 while southern Italy remained divided between Byzantine, Muslim and Lombard power. The Carolingian Empire lacked the modern techniques of bureaucratic control, and therefore relied on agrarian surplus extraction and military patronage. Charlemagne controlled his claim over Italy via a patchwork of pre-existing elites such as local lords or ecclesiastical authorities.

In northern Italy, this produced a structure of delegated authority. The old Lombard aristocracy retained local power under Frankish suzerainty, and monastic orders such as those at Bobbio and Monte Cassino were endowed with lands to serve both spiritual and administrative roles. Monasteries became key nodes in the reproduction of feudal authority. They were not simply religious institutions, but landlords, scribes and toll collectors. As Wickham (2005) notes, these monastic complexes functioned as territorial powers, often exercising greater day-to-day authority than the Carolingian court in Aachen.

Southern Italy, by contrast, remained largely outside Carolingian control. The duchy of Benevento maintained relative autonomy, and Byzantine authority lingered in Naples and Calabria. The fragmentation of the south into Greek, Latin and Arabic-speaking polities created a complex frontier zone that remained structurally unintegrated into the Frankish system. This regional disunity reflected not only military contingency but the inability of any single power to overcome the constraints of terrain, feudal fragmentation and cultural pluralism.

By the mid-ninth century, the Carolingian Empire had begun to fragment under internal succession disputes and external pressures. The Treaty of Verdun in 843 divided the empire among Charlemagne's grandsons, creating separate kingdoms that would

become the antecedents of modern France, Germany and Italy. Italy was carved out as the Kingdom of Italy, nominally under Frankish rule but increasingly self-governed by regional magnates.

This period saw the rapid feudalisation of Italian society. In the absence of strong royal authority, local lords expanded their power through private justice, control over fortified centres (*castra*) and the appropriation of fiscal rights once reserved to the state. What emerged was a system of fragmentary lordship, in which secular and ecclesiastical elites governed through patrimonial rather than public authority (Wickham, 2005). This was a structural reorientation. The feudal mode of production which was based on land tenure and decentralised surplus extraction became the dominant system across much of central and northern Italy. Lords provided military protection in exchange for labour and rents, while the peasantry was increasingly bound to the land through customary obligation. By the tenth century, the Italian landscape was defined less by Roman imperial legacies and more by the realities of feudal localism.

Monasteries remained central to this process. As the Carolingian state weakened, abbeys became islands of stability, literacy and landholding. They acquired large estates through donations and royal grants, and these estates – often worked by tenant peasants – became critical sites of agricultural production. This system did not produce a dynamic surplus capable of urban development. Feudal agriculture was risk-averse, localised and oriented toward subsistence and obligations. Innovation in crop rotation or yield maximisation was limited. Moreover, the feudalisation of surplus meant that production flowed upward to aristocratic consumption or ecclesiastical construction, rather than reinvestment in productive infrastructure.

In southern Italy, Muslim control of Sicily after 902 created a politically and economically powerful rival to Latin Christendom. The Emirate of Sicily developed a flourishing agricultural and commercial economy, integrating into Mediterranean trade networks while exerting pressure on Christian territories. The result was a structural bifurcation: while northern Italy slipped into

feudal fragmentation, Sicily and parts of southern Italy remained integrated into the Islamic world-economy, with different legal, agrarian and fiscal systems (Metcalf, 2009).

This divergence would persist. The south's inclusion in the Islamic and later Byzantine and Norman circuits produced a layered economic and social fabric distinct from the Latin feudal norm, and contributed to its later marginalisation within unified Italian national narratives.

Tenth-century situation

From the fall of the Western Roman Empire, Italy could not be understood through the lens of national dynasties, as was the case on the Iberian Peninsula. It was neither a coherent polity nor a unified cultural unit. There was no clear hegemon or imperial centre. Yet the peninsula remained a central focal point in the Mediterranean world-system, and it was within this wider system of commerce, production and exchange that it developed. Coastal cities like Venice, Genoa, Amalfi and Pisa exploited their access to Mediterranean trade networks, positioning themselves as commercial intermediaries between the Islamic, Byzantine and Latin worlds.

The collapse of Carolingian authority in the ninth century created a political vacuum. The weakening of centralised state structures allowed local lordships to intensify their control over urban centres, which in turn created the conditions for the re-emergence of long-distance trade. From these conditions, the city-states began to form, developing distinctive institutions of self-government and corporate identity. Milan, Pisa, Genoa and Florence began as episcopal cities but gradually asserted civic autonomy through local militias, commercial guilds and elected magistracies (Jones, 1997; Wickham, 1998).

From its very foundation, Venice was driven to trade, as nothing would grow on its sandy islets. In order to procure a livelihood, its first inhabitants were forced to exchange salt and fish

for corn, wine and meat (Pirenne, 2014 [1937], p. 27). From the tenth century onwards, long-distance trade in luxury goods began to revive. Silks and spices passed through the nodal points of the Italian cities. The economic autonomy of the rising merchant classes gave rise to a new dominant class fraction. This group relied on urban taxation, maritime insurance and proto-industrial dominance. In most areas of Europe, land was everything and commerce nothing. The city of the lagoons, which had no land, turned this on its head.

Southern Italy followed a different trajectory. Byzantine and Islamic control disintegrated at the end of the eleventh century, though their cultural influence persisted. This disintegration enabled the emergence of a centralised kingdom – the Kingdom of Sicily – under Norman rule. These adventurers from northern France consolidated their authority through military conquest and papal legitimation. Unlike the communal republics of the north, the Kingdom of Sicily developed along monarchical lines, but with a remarkably cosmopolitan administration. It drew on Greek, Latin and Arab institutions and encompassed within its boundaries Greeks, Arabs and Jews (Metcalf, 2009). Sicily's position within Mediterranean trade routes made it a crucial provisioning hub and a major grain exporter, tying western European and North African circuits of capital. Palermo came to embody the cultural syncretism that characterised the Mediterranean world.

What emerged in Italy was a differentiated regional system in which various zones of the peninsula played structurally distinct roles in the world-economy. Genoa and Venice functioned as mercantile-financial cores; Florence and Lucca developed as proto-industrial centres; Sicily acted as a resource-exporting periphery, while the Papal States operated as an ideological and territorial intermediary. The commune, the kingdom and the papacy each represented distinct articulations of statehood, conditioned by the demands and constraints of global trade, regional power and class reproduction.

The meeting of Christian and Islamic worlds

Between the tenth and thirteenth centuries, Italy occupied a unique position at the interface between Latin Christendom, the Byzantine east and the Islamic south. The Mediterranean was a fluid and contested space of exchange, conflict and cohabitation. The tenth century witnessed the beginning of a commercial revival across the Mediterranean. After centuries of contraction following the collapse of the Western Roman Empire, Italian merchants began to re-establish maritime connections with Muslim polities in North Africa, Egypt and the Levant. This was the re-entry of Christians to Islamic-dominated circuits, rather than a conquest of trade routes. The caliphates of Cairo and Córdoba and the merchant hubs of Tunis and Alexandria were already fully integrated, trading in spices, textiles, slaves and precious metals (Goitein, 2000).

Italian ports entered these circuits as junior partners. They paid customs duties and engaged in regulated trade under Islamic law. Italian merchants were granted residence in Muslim ports under protection and their commercial agents often learned Arabic and operated within Islamic institutional frameworks (Abulafia, 2011). This trade enabled the importation of silks, sugar, glass and paper; it brought mathematical and navigational techniques to Italian cities as well as agrarian techniques and irrigation systems.

Ideas moved alongside goods. Ancient science, philosophies and medicines were reintroduced to Italy thanks to translations from Muslim Spain and Sicily. While Italian scholars and clerics played a role in this process, it was largely due to the skill of the Muslims. The Italian philosophical and medical schools of Salerno and Bologna relied heavily on Islamic models of education and theory. The very language of science and commerce – algebra, algorithm, tariff – bear the imprint of this interconnection.

Nowhere was the Islamic-Christian interface more visible than in southern Italy and Sicily. Under Muslim rule from the ninth to the eleventh century, Sicily developed a sophisticated agrarian and urban economy. Palermo, the capital, was one of the largest and

most cosmopolitan cities in Europe, with Muslim, Christian and Jewish communities engaged in administration, commerce and crafts (Metcalf, 2009). When the Normans conquered Sicily in the eleventh century, they preserved much of the Islamic administrative and cultural system. This legacy was systematically dismantled in later centuries. The expulsion of Muslims and Jews in the thirteenth and fifteenth centuries, respectively, was part of a broader pattern of homogenisation across Europe. But for two centuries, southern Italy had demonstrated that cultural synthesis could be politically stable and economically dynamic.

The Crusades altered the terms of the Islamic-Christian interface. What had previously been dominated by regulated commerce became increasingly militarised. Italian city-states played a central role in crusading logistics: Pisa, Genoa and Venice provided fleets, supplies and credit for crusading armies. In return, they were granted commercial privileges in the newly conquered Levantine cities, including Acre, Tyre and Antioch.

The Italian city-state system

The Italian city-state system developed under the shadow of the cultural superstructure of the papacy. Initially, city-states were reluctant to create new centres of institutional power. Consular roles emerged at the end of the eleventh century, with the first being established in Pisa in 1085. The consuls of these cities looked to the ruling bishops, the episcopal palace and their administrators as centres of authority.¹ 'Political and cultural continuity with the real and imaginary past was upheld by the continued importance of the bishop as the main focus of public authority and by institutions like the public forum inherited from Antiquity' (Epstein, 2000, p. 282).

Contemporaneously, the growing volume and complexity of trade encouraged the emergence of craft and merchant guilds. The relationship between these institutions was self-reinforcing, as

¹ Consuls were comparative to aldermen in medieval England. They are best understood as an aristocratic class.

both responded to the same economic stimuli and impulses. On the one hand, the artisan and merchant guilds needed the consuls to establish and uphold reciprocal rules of engagement with other guilds. Meanwhile, the newly established consuls relied on the economic power of these guilds to solidify their own economic and political authority after the fall of the Carolingian Empire.

At the inception of these institutions, their role was primarily to facilitate and secure internal trade within the city-state, particularly in maintaining control over their rural hinterlands. As these city-states developed, the same trade impulses that led to the creation of consuls and guilds also drove these institutions – through the institutionalised power now enshrined within the city-state system – to seek trade with other like-minded states. By the beginning of the twelfth century, the purpose of the city-state was to function as a trading entity both internally and externally (Hicks, 1969).

The twelfth century was the period in which the Italian communes began to form more durable institutions, codifying customary law, asserting judicial sovereignty and organising collective defence through leagues such as the Lombard League (1130s–60s). Trade was especially crucial for the Italian peninsula due to its advantageous geographic position. The Italian peninsula's position within the Mediterranean meant that it was at the centre (both geographically and economically) of the world-system. Due to its privileged location, the region could sustain a large number of city-states as viable political and economic entities. Successful political and economic models led to imitation through institutional diffusion. By the end of the twelfth century, Italy boasted approximately 300 city-states due to the imitation of successful major Italian city-states.

By the thirteenth century, northern and central Italy had become the most urbanised region of Europe, with city-states functioning as key logistical hubs in the pre-capitalist Mediterranean world-system. Guild-based production emerged within the textile and metalworking sectors, credit and finance developed in cities such as Florence, linking the economy of northern Italy to the Champagne fairs of northern France and the ports of Alexandria and Constantinople.

The economy of the city-state

The thirteenth century marked the consolidation of northern Italy's city-states as autonomous political economies. Genoa, Venice, Florence, Siena, Milan, amongst others, developed institutions capable of extracting surplus not only from local peasants and artisans but also from long-distance trade routes and peripheral zones. These cities were built upon commerce, the control of their rural hinterlands and the rivalry that existed between them. Their rise coincided with the commercial expansion of the Mediterranean world where merchants became middlemen for a trade that spanned the Islamic world, the Black Sea and Western Europe (Abulafia, 2011).

This trade was dependent on the rights and rents that each city-state could claim for itself and therefore they were consistently in a state of piracy, shifting trade rights and, occasionally, war. City-states were not interested in the production of goods, but in their exchange. It was a system of commercial intermediation (Lane, 1973). Surplus was extracted through credit, freight and monopolistic contracts. This meant that trade was a zero-sum game; the rise of one city-state would mean the collapse of others due to the need to monopolise trade. For this reason, Genoa and Venice developed increasingly aggressive naval and colonial strategies. In effect, they split the Mediterranean between them – east and west – extending their control over the Dalmatian coast, the Aegean islands and the ports of the Black Sea. Banaji (2020, p. 31) described Italian hegemony in the Aegean in this period as follows:

By the terms of the treaty of 1082, Venetian merchants could buy and sell in every part of the Empire, free of duty or customs examinations. Many ports were opened and vast territories made accessible to them for free trade. These privileges, renewed by the emperors of the twelfth century rendered the Venetians virtual masters of the commercial life of the

Empire. By the thirteenth century when the Genoese came into Byzantine economic life in a big way and similar wide-ranging concessions were granted, Italian merchants, whether Genoese or Venetians, became so entrenched in Constantinople that they controlled the economy of that city. And by the end of the thirteenth century, the islands of the Aegean (the Archipelago) were being divided between Genoese and Venetian control, the Aegean's east coast becoming the heart of Genoa's maritime domain.

The inland cities, which could not depend on maritime trade, moved instead towards proto-industrial production. Florence employed thousands of wage labourers under the guild system of manufacture and export while an oligarchical centre of banking also developed, which helped to finance monarchs and merchants across Europe. They operated as the financial arm of the world-system, linking commodity production in Flanders and England to surplus-consuming centres in Italy and beyond (Goldthwaite, 2009). The rural peripheries were incorporated into the city-states. Urban elites consolidated their power over surrounding territories through the acquisition of land and expanding their legal jurisdiction. This process of territorialisation transformed the city-state from a municipal republic into a regional seigneurie. A centralised apparatus capable of extracting value from the town and countryside was developing (Jones, 1997).

Southern Italy, by contrast, was becoming increasingly peripheralised. The Kingdom of Sicily remained an economy structurally dependent on agrarianism, exporting raw materials and importing capital and manufactured goods. While the communes of northern Italy were benefitting under a newly acquired political independence, southern Italy was increasingly subordinated to external dynastic powers such as the Angevins and the Aragónese. It was a state whose *raison d'être* would be decided from outside and by others (Epstein, 1996).

Banking and finance

Northern Italy emerged not only as a centre of trade and urban manufacturing, but as one of the key nodes in the development of early finance. Long before the rise of London or Amsterdam, the city-states of Florence, Siena, Venice and Genoa had developed sophisticated instruments of credit, exchange and public finance. These developments reflected the needs of an economy that was structured around long-distance trade and political fragmentation.

The political fragmentation of the Italian peninsula, while an impediment to territorial unification and markets on a national scale also encouraged innovation. Merchants required tools to operate across jurisdictions, to manage risk and to extract surplus from volatile trade routes. The *cambium* (bill of exchange) developed to allow merchants to settle debts across city-states, enabling the expansion of commerce. It also abstracted the value-form away from particular commodities. It allowed merchants to defer payments, convert currencies and avoid the burdensome transport of physical coinage.

Merchant-banking houses such as the Bardi and Peruzzi in Florence combined familial ties with commercial risk-taking. These houses provided credit to monarchs, leveraged and financed grain imports, and underwrote expeditions during the crusades. Florence was the pioneer of financial sophistication in the thirteenth and fourteenth centuries. Its bankers developed double-entry bookkeeping and operated transnational networks of agents and clerks. The Medici Bank, founded in 1397, became emblematic of this system. It was a family-run financial institution which was embedded within a wider web of political patronage and commodity trade. By the sixteenth century, Genoa had overtaken Florence as Europe's premier financial centre and banking place. Genoese bankers developed mechanisms to lend to the Spanish crown via the system of *asientos*. These were short-term loans that were repayable in silver that was brought from the Americas. In Braudel's phrase, they created an 'aristocracy of finance' that extended its reach far beyond

the Ligurian coast which was its home. This system would later be adopted by other European states such as the English and the Dutch in the seventeenth century as Genoa, Florence and Venice moved from the core to the semi-periphery of the world-system. From the *asientos*, Genoese bankers gained a privileged position across the vast domains of the Habsburg Empire which tied together Seville, Antwerp and Naples with Genoa. This system would ultimately, however, overexpose Genoa to events in Spain which was prone to defaulting on its debt.

Italy innovated by using public debt as a mechanism of state finance. In Venice and Florence in particular, *monte* (public bonds) were issued to finance wars, infrastructure projects and state-building initiatives. Citizens could purchase shares in state debt, and would receive interest on their investment. This was a prescient class strategy: the interests of the urban elite would coalesce with those of the state; the state needed to survive to ensure a return on investment. This consolidated the power of the merchant class while institutionalising a form of oligarchic governance. The blurring of finance and governance was especially pronounced in the city-states due to the absence of a centralised monarchy, where finance reproduced the rule of the elite. This was also one of the main shortcomings of the system. Banking networks would remain embedded in personal and familial ties, meaning that impersonal markets as would develop later in the Netherlands and England never flourished.

These developments entrenched a northern Italian bourgeoisie whose wealth rested not on land but on credit, trade and speculation. This class increasingly supplanted the feudal aristocracy in economic power, even if political authority remained contested. Yet this proto-capitalist transformation was limited. It relied on external trade circuits and elite consumption rather than internal productive reinvestment. There was no agricultural revolution to generate a rural proletariat, and the cities remained islands of financial accumulation amidst a largely subsistence hinterland.

As the capitalist world-economy expanded into the Atlantic and shifted away from the Mediterranean, this financial dominance eroded. Dutch, English and French institutions, which were backed by more consolidated national states, surpassed the fragmented Italian polities in maritime insurance, industrial finance and overseas credit.

The development of the city-state system

Night fell at least twice in Italy, first in about 1450, then again in about 1600. The sky of the whole of Europe was lit by it.

Fernand Braudel

At the beginning of the twelfth century, roughly 300 city-states existed in Italy. By the end of the fifteenth century, this number had been significantly reduced. By 1494, the number of city-states had dwindled to about a dozen. This followed broader European trends of territorial expansion and concentration which came from population growth and urban development. New land needed to be acquired and the city-states had a finite number of actions they could take. They could either extend their territories to access larger markets or trade more efficiently in existing markets by enforcing clearer property rights. The increased competition between merchants – which initially helped lower transaction costs – eventually led to diminishing returns from trade. While it was temporarily possible to navigate these bottlenecks by trading with rival cities, the absence of a single jurisdiction encouraged city-states to free-ride or default. In the absence of such coordination, the only viable path was to establish a single authority to enforce the rules of the game. Consequently, territorial units expanded to enforce these property rights, leading to a reduction in the number of city-states as the weaker entities succumbed to the stronger.

A relative equilibrium developed between the twelve separate centres of power. This helped contribute to Italy's relatively late state development. Politico-economic cores were developing in

western Europe. France was a unitary state under the king, Wessex *de jure* had extended its power across England, and the two main cores of the Iberian Peninsula in Aragón and Castile had united. On the Italian peninsula, centralisation had not taken place to this extent. As Braudel (1995b, p. 657) argued:

By the fifteenth century, the city-state was already losing ground; first signs of this crisis could be detected in Italy during the early years of the century. In fifty years, the map of the Peninsula was entirely redrawn, to the advantage of some cities and the detriment of others. It was only a partial eclipse. The upheaval failed to achieve what may have been at issue – thought I doubt it – the unification of the Italian Peninsula. Naples, Venice, and Milan in turn proved unequal to the task. The attempt in any case would have been premature: too many particular interests were at stake, too many cities eager for an individual existence stood in the way of this difficult birth. So, it is only partly true that there was a decline in the power of the city-state. The Peace of Lodi, in 1454, confirmed both a balance of power and a deadlock: the political map of Italy, although simplified, was still a patchwork.

The city-states themselves deliberately attempted to maintain this equilibrium. The sixteenth-century Italian historian Francesco Guicciardini argued that each state observed the others to ensure that no single one could dominate the peninsula. This meant that ‘one should therefore not help the strong ... but help the weakest part so that a balance can prevail’ (Andersen, 2018, p. 3). This aim of balancing led to the Treaty of Lodi in 1454 whereby peace was achieved between the Venetian republic and the duchy of Milan with Lorenzo de Medici and the state of Florence acting as a counterweight to the two.²

2 The Peace of Lodi had another important consequence, it ‘institutionalized the northern Italian balance of power, and provided a model for the institutionalization of the European balance of power by the Westphalia treaties two centuries later (Arrighi et al., 2004, p. 277). This, importantly, was the origin of the idea of state sovereignty which would come to define European inter-state competition in the capitalist period.

The guilds and agriculture

The domination of the city over the country in northern Italy led to a dense urban network of production and trade. Export was based on the manufacture of woollen and silk textiles. This production was in the hands of the guilds: associations of people working in the same trade. Membership was generally compulsory, and their role was to regulate production, quality and pricing. Each city-state had its own guild for each trade; for example, Florence had the *Arte di Calimala* (cloth merchants' guild) and the *Arte della Lana* (wool merchants' guild).

The guilds were central to the rise and future decline of Italian production. The regulations of the guild maintained the high quality of Italian products. They contrived to guarantee both protection and equality between members. 'The result was to safeguard the independence of each by the vigorous subordination of all' (Pirenne, 2014 [1937], p. 186). The guild monopoly in Italy meant that initiative could not overcome the weight of tradition. No member was allowed to devise new, more productive ways of producing items more cheaply or quickly. While Italian products would remain of a higher quality than Dutch and English cloth and wool production, the technological revolution in these countries meant that they could produce items cheaper and more quickly, opening up new markets untouched by Italian artisans and thus affecting their position within the world-system. Labour costs in Italy were prohibitively high, leading to Italian products becoming uncompetitive (Cipolla, 2004, p. 261). The fledgling enterprises in England and the Low Countries required the development of home markets to mature and thus began to eschew Italian products. This nuanced protectionism was coupled with the establishment of national institutions, such as banking systems, which further undermined the economy of the Italian peninsula, which lacked its own large home market.

The Kingdom of Naples continued to make use of the advantages that nature had bestowed on it and maintained an agricultural economy more akin to the situation in western Europe. The

kingdom's grain production was based on a three-year production cycle, whereby land was cultivated for two years and left fallow for one. Wheat was by far the most important crop – followed by barley – while some pasture was reserved for the beasts of burden that helped cultivate the land. To counteract soil depletion, transhumant sheep farming was reintroduced to Apulia, whereby fields alternated between arable land and pasture, showing a level of understanding by the southern Italian peasant of the ecology of their land. By the sixteenth century, the kingdom's exports were primarily based around fruit trees for wine production and olive groves for oil. Olive oil was in high demand both for consumption and because it was used in the manufacturing of woollen textiles; after washing, oil was applied to the product. The Kingdom of Sicily was medieval in every sense of the word. It was a place where 'life was dominated by agrarian rhythms, free of haste, careless of exactitude, unconcerned by productivity' (Le Goff, 1980).

Hidden labour

The Italian city-states were fundamentally littoral in nature. Their power was derived not from land but from their orientation toward the sea. It came from maritime commerce, port control, naval contracts and the circulation of goods and people across the Mediterranean. Yet beneath the gilded histories of merchant dynasties and diplomatic pacts lies a hidden structure of labour, without which the maritime economy could not function.

The ports of Genoa, Venice, Naples and Palermo relied on free and unfree labour for their wealth. Galleys were manned by paid oarsmen, slaves and penal labour, and these crews formed the invisible workforce of the maritime republics. Venice's *arsenale* employed over 16,000 labourers at its height, with many coming from subaltern or lumpen elements of society – immigrants and convicts (Tenenti, 1967). This was the largest industrial site in Europe before the Industrial Revolution. Their work was vital. Ships had to be built, rigged, maintained and sailed. Ports had to

be dredged, walls manned and cargo loaded. Dockside industries from rope-making to ship chandlery formed a material substratum beneath the more visible institutions of merchant republics.

The organisation of port labour reflected a broader instability in the position of the Italian city-states. Maritime workers were neither securely proletarianised nor rooted in subsistence economies. They occupied an intermediate social position which was marked by mobility, irregularity and precarity. Dockworkers, stevedores and ship's boys often migrated seasonally from the interior or from neighbouring Mediterranean coasts. The resulting labour force was ethnically and linguistically diverse, especially in ports like Naples and Palermo, where Slavs, Greeks, North Africans and southern Italians mingled under oligarchic rule (Bevilacqua, 1998). The ideological construction of 'Italy' as a cultural unit often erased these figures. And yet, it was precisely their labour that underwrote the wealth and splendour of the merchant republics. In this sense, the cosmopolitanism of Italian port cities was not elite but subaltern.

The social superstructure

The economic and political form of the city-state needed an ideological superstructure which would sustain and maintain it. Its institutions relied on a network of jurists, theologians, scribes and artists whose work gave a symbolic importance, coherence and legitimacy to oligarchic rule. Intellectual labour was structured around the needs of the merchant oligarchies and ecclesiastical authorities who tried to maintain order and hierarchy.

Universities emerged in Bologna and Padua and were closely tied to the requirements of the city-states and the papacy. They became training grounds for the new administrators and judges that were needed to sustain the economic base of society while legal humanism allowed oligarchies to drape their authority in classical garb while extending it through increasingly sophisticated mechanisms of control.

Cultural reproduction also served the political needs of the elites. Artists, architects and poets showed patronage to them. The architectural and artistic marvels of feudal Italy legitimated their control. The Medici, for example, sponsored artists to reinforce their own social status while associating their regime with civic virtue and religious piety (Burke, 2006). The church, meanwhile, attempted to control and repress knowledge. Its monopoly over spiritual authority was reinforced through censorship. It launched the Inquisition, created the Index of Forbidden Books and controlled the licensing of printing, all of which gave it ideological control. This ideological superstructure was central in reproducing elite rule.

The church

The Catholic Church in Italy was not merely a spiritual force, nor simply a cultural actor, but a central institution in the reproduction of the Italian social order across centuries. While historians often analyse its theological influence or aesthetic patronage, the church's structural function as a landowner, tax agent, ideological apparatus and political actor positioned it as one of the most durable components of social and material life in the Italian peninsula.

From the collapse of Roman imperial authority to the threshold of modern capitalism, the church provided the institutional continuity absent from most political formations. It possessed the bureaucratic infrastructure, symbolic legitimacy and financial resources to outlast dynasties, communes and empires. In a fragmented and territorially unstable peninsula, the church did what the state could not: it collected revenue, monopolised knowledge, regulated marriage and inheritance, and provided juridical continuity in the absence of a consolidated legal code (Luzzatto, 2013).

Above all, the church was a huge landholder. By the high Middle Ages, ecclesiastical institutions controlled between one-

fifth and one-third of arable land in many regions, particularly in the centre and south (Kertzer and Barbagli, 2001). Monasteries, bishoprics and convents functioned as landlord estates, extracting rents in kind and labour from peasant tenancies. In the south, the church often acted as a counterweight to baronial dominance; not in the interest of redistribution but to entrench a stable alliance of rentier classes within the Bourbon or Spanish vice-regal state. In the Papal States, the fusion of temporal and spiritual authority formed a uniquely regressive political economy in which the modernising impulses of merchant and artisan classes were institutionally blocked.

The church was also the primary agent of ideological reproduction. Its monopoly on literacy, education and spiritual authority gave it a near-total grip on the production of consent. Sermons, sacraments and confessional culture policed not only moral boundaries but class behaviour. Dissenters, radicals and peasant millenarians were suppressed not simply as heretics but as threats to the social order. The Inquisition, particularly strong in Italy, functioned as both spiritual and class police – punishing those who disrupted the authority of landowners, princes or divine hierarchies.

Importantly, the church was a global institution which fought against the birth of the capitalist world-system. It acted as a stabiliser of feudal relations during the long medieval boom and later became a centre of conservative counter-revolution. During the *Risorgimento*, its opposition to Italian unification was both theological and material: unification threatened its landed property, its legal autonomy and its role in the class structure of the peninsula (Clark, 2005).

The church's longevity lay in its ability to adapt to structural change while continuing to perform its roles such as managing the reproduction of labour and legitimising elite authority. It often shielded landed power from the pressures of democratic or proletarian transformation.

A failure to transition?

In hindsight, northern Italy seemed in a much stronger position to lead what would become the rise of capitalism than the Low Countries and England as it boasted the most developed economy in medieval Europe. The fact that the Italian city-states did not transition is sometimes viewed as a ‘failure’ on their part. Yet to view human development as a simplistic trajectory which is continually moving toward capitalism is to create a teleological, predetermined transition. Pre-capitalist societies are then seen as being ‘unsuccessful’ in their attempts to transition, rather than being viewed on their own terms, as incredibly successful (or unsuccessful) pre-capitalist societies. Historians are working with the benefit of hindsight. Because capitalism emerged, it is assumed it was always meant to emerge. While answering the question as to why capitalism did not develop on the Italian peninsula is a question very much worth exploring, doing so under the lens of predeterminism is less so.

Long-distance trade

The city-states were led by their merchant class and relied upon long-distance trade. Long-distance trade tends to rely on the isolation of markets and poor communication. This form of trade is not based on production but on circulation. The isolation of markets means that one may buy cheap and sell dear between one place and the next, precisely because those two markets are disconnected. Long-distance trade remained oligopolistic in character, while it was the simple crafts and agricultural commodity markets that were competitive.

These merchants, therefore, acted as intermediaries between separated zones. Up to a certain point, ‘feudalism as a system should not be thought of as something antithetical to trade. On the contrary ... feudalism and the expansion of trade go hand in hand’ (Wallerstein, 2011a, pp. 19–21). This long-distance trade was crucial in solidifying the position of the merchant class and in the spectacular growth of

Italy in the Middle Ages. However, this growth, which stemmed from long-distance trade, did not lead to a profound transformation of the economy. The economy maintained a dualistic character with two separated spheres of production. These spheres of production – one local, one international – meant that the dynamism of the urban economy did not permeate and proliferate throughout the wider agrarian society. The hinterlands remained conservative and subsistence-based. The urban oligarchies continued to rely on these hinterlands, while their concentration on circulation rather than production meant that capital was not reinvested into more efficient production. There was, simply, no need.

Local and bulk trade remained within its feudal shell, while long-distance trade was usually in luxuries. While clearly important, this form of trade is much smaller and has less effect on the reproduction of everyday life than bulk and agricultural trade. It was local, regional and interregional trade which touched the lives of a considerably larger percentage of the population and their means of reproduction as classes. Considering the high technological cost of transport that continued in the medieval period, it would have been the more localised interregional trade that would have created the possibility of diversification and competition. The exchange of agricultural products, the necessities of life, raw materials and manufactured goods for the mass of the population would offer more opportunities for economic transformation and regional specialisation. It is not until the expansion of production in the modern world-system that long-distance trade could change into a trade of commodities.

The south

The dualism of the Italian economy, between the conservative and aristocratic and the dynamic and urban, is exemplified by the north's relationship to the south. At the beginning of the long sixteenth century, the north had begun to economically control the south. The Kingdom of Sicily was under the control of the Kingdom of Aragón, and the north allied itself economically to these foreign rulers.

The Aragónese imported the latifundia (*latifondo* in Italian) system that existed in Majorca and those Islamic parts of Iberia that Castile had conquered. While agriculture had always been the dominant component of the local economy, it now became concentrated in the hands of a feudal aristocracy, with land becoming both the source and symbol of power.

Southern exporters under the tutelage of the Aragónese now responded to the rhythms and impulses of the northern oligarchies. The north Italian city-states tried to make up for their lack of territorial and agricultural lands in their own hinterlands by exploiting the south. The south became a vast *contado*: a farmland in service to the north. The commercialisation and urbanisation of the north was predicated on the continued agricultural structure of the south. The *latifondo* transformed the social structure of the south from what were small peasant holdings into vast, market-oriented rural enterprises of arable farming. While serfdom had been abolished, the peasants were in effect tied to the land and paid the owner his due. There was no incentive for the peasant to improve productivity, as this would simply be expropriated by the aristocracy. The south became a monoculture of mainly grain production, and its economy waxed and waned with the variations of supply and demand in the northern city-states (Heller, 2011).

Feudal social structure

While the city-states exhibited some attributes that we might associate with capitalism, this was little more than ‘a seasoning to an essentially medieval or feudal dish’ (Hobsbawm, 1954, p. 33). Although the consuls of the city-states grew wealthy through long-distance luxury trade, the internal structure of society remained largely unchanged. The surpluses that were generated were not reinvested into agriculture or aimed at increasing its productive capacity. The rural hinterland was viewed merely as an appendage to the town; its sole function was to feed the urban population. The general unfreedom in which the peasantry lived

under the shadow of the town meant that the urban-based consuls felt no imperative to improve peasant conditions or to facilitate easier or more productive agricultural labour. Instead, wealth was funnelled into the construction of architectural masterpieces: palaces, churches and civic buildings.

The European world remained fundamentally feudal, and the relatively small size of the city-states meant they could not transcend this reality, but instead grew within its confines (Heller, 2011, p. 58). The dominance of town over country meant that powerful workers' guilds were able to impose wage levels above the value of productivity. While the price revolution of the sixteenth century led to more competitive wage levels in the newly developing industrial centres of England and the Netherlands, wages in the older centres – such as northern Italy and Flanders – rose alongside inflation and thus became uncompetitive.

For capitalism to emerge successfully, agrarian society had to be transformed. Competition had to be introduced into agriculture, leading to the growth of a landless labouring class, dislocated from its means of social reproduction. So long as people could meet most of their needs from their own production, there was little scope for any capitalist imperative to take root. If the mass of the population were kept outside the sphere of what might be considered a capitalist market – neither selling their labour-power nor buying commodities at any scale – then capitalism could not overcome its feudal fetters.

This transformation began slowly in the Atlantic region of England and the Low Countries. Here, an emerging social class could no longer produce or exchange its own food and clothing, which now had to be purchased with money. This led to the development of new bulk markets for textile production (Wallerstein, 2011a, p. 190). The guilds, tied to older forms of organisation, were uninterested in serving this new class. They maintained their role as producers of luxury goods, but it was not luxury goods that would transform society: it was factories producing for bulk consumption and the creation of a wage-

dependent working class. In England, when wage levels increased too much, production could be moved to the countryside where there was now a mass of underemployed or wage-working labourers who were able to engage in industrial labour. In northern Italy, the guilds were so strong that they were able to resist such initiatives.

This decision was rational from the perspective of the guilds. Why would they abandon centuries of artisanal prestige to produce lower-quality goods for less money? The new form of social organisation offered little appeal to the affluent and highly-organised members of the guilds, who saw no reason to relinquish their economic and symbolic dominance.

The final structural constraint was the political fragmentation of the peninsula. Italy was simply too divided to create the national market and economic diversification needed for capitalist take-off. While Spain, England and France were busy 'solving' the problem of political decentralisation – consolidating power into centralised states – Italy remained fragmented among competing city-states. The balance of power meant that no single state was strong enough to unify the peninsula and build a national market, nor could any of them mobilise their rural peasantry for such a project. It would not be until the mid-nineteenth century that Italy would achieve any meaningful unification.

Any possibility of a capitalist transition remained limited to a regional base, insufficient to transform feudal society in any systemic way (Zangheri, 2013). While the city-states may have contained the kernels of capitalism, they would have had to transform the world-system itself and not merely their internal structures for capitalism to prevail. They were not up to this task. Their failure to create a national state and a unified market left the peninsula vulnerable to foreign intervention. Italy became a theatre of conflict for Spanish, French and Austrian powers, all of which contributed to the stagnation of its economic development and further delayed its political consolidation.

The changing position of Italy within the world-system

If Italy declined, it was because the combined curves of the Western World (other than Italy) did not stop climbing. Italy followed, but neither surpassed nor had any longer control over the movement. It declined because Holland rose. In sum, the game of grandness is not entirely but substantially a relationship with the external.

Fernand Braudel

The rise of the Atlantic and its new horizons with the discovery of the Americas led to the economic ascent of the Low Countries, Iberia and England. This new spatial and geopolitical reality, as Braudel writes, ‘was to decide the destiny of the inland sea as the sixteenth century drew to a close’ (Braudel, 1995a, p. 24). The emergence of the modern world-system recalibrated the cores and peripheries of Europe. London and Amsterdam became new international centres of trade, fuelled by the influx of bullion from the Americas, now the primary periphery of the system. Eastern Europe was also peripheralised as a grain-exporting region. Meanwhile, northern Italy was semi-peripheralised as the central axis of trade shifted away from the Mediterranean and toward the Atlantic. The Mediterranean, once a central maritime artery, was reduced to importing Atlantic manufactures and Asian and American goods via north-western European intermediaries. The destiny of the world-economy was now to be decided in north-western Europe.

The modern world-system came into being in the long sixteenth century, as did the creation of the Americas as a geosocial entity. As Quijano and Wallerstein (1992, p. 549) write, this was not a case of integration into an existing system; rather, it was its foundational moment: ‘The Americas were not incorporated into an already existing capitalist world-economy. There could not have been a capitalist world-economy without the Americas.’ The decline of Italy’s relative global importance, the rise of

capitalism and the creation of the Americas as a periphery were all structurally intertwined phenomena.

The increase in the availability of precious metals and movable wealth from the Americas accelerated capital accumulation in Atlantic Europe and simultaneously undermined Italy's commercial standing. Italy's fragmented political geography and the small size of its states prevented it from adjusting to the new systemic order. Prior to the discovery of the Americas, Venice had been Europe's largest bullion market and its leading banking centre. But the influx of silver and gold from Spanish America, flowing through Seville, Lisbon and later Amsterdam displaced Venice's financial primacy (Mueller, 2019). Dutch ships had become more efficient and technologically advanced in the seventeenth century which led to better naval navigation and further reduction in the importance of the Mediterranean Sea. By concentrating on carrying capacity and cost of operation, they evolved hull forms that maximised cargo space above overall dimensions. As Hobsbawm (1954, p. 34) put it, the result was stark: 'the Mediterranean ceased to be a major centre of economic and political, and eventually of cultural influence, and became an impoverished backwater'. The world-economy had structurally bypassed the Mediterranean and, with it, the Italian peninsula.

Italy never truly recovered from this shift, neither geographically nor structurally. Italian ships were poorly suited to navigating the narrow and heavily militarised Straits of Gibraltar, effectively locking them out of the Atlantic. At the same time, the Alps formed a significant natural barrier to overland trade with the newly ascendant centres of north-western Europe. The consequences were long term. Italy's relative GDP per capita was lower in 1861 at the dawn of unification than it had been in 1440. The most significant comparative decline occurred between 1440 and 1580, precisely as the new world-system was emerging and consolidating (Malanima, 2003).

The fall of Italy

For centuries, Italy had been central to the economic and cultural circuits of Europe. It was where east met west, where north met south. Its cities glistened with the fruits of merchant wealth, and its ports had been the stage upon which civilisations traded silks, slaves and spices. Yet from the sixteenth century onward, this equilibrium was disrupted. A reorientation of the world-economy was underway and the Atlantic rose.

From the time of Rome's decline through to the late Middle Ages, the power of Italian polities generally came from their control of strategically important trade nodes and from oligopolistic trade contracts. States like Genoa, Venice, Pisa, Amalfi and Florence had played the role of intermediary between Christian Europe, the Byzantine and the Islamic worlds in the world-system. In this regard, surpluses flowed less from land, but instead from the movement of people, cloth, bullion and spices.

The structural realignment of the world-economy in the sixteenth century, centred on the emergence of Atlantic trade, marked a turning point not just in the geography of commerce but in the very framework of accumulation. It was not simply a matter of new routes or rivals; it was the beginning of a world-system whose axial division no longer passed through the Mediterranean. With the Spanish conquest of the Americas and the Portuguese opening of the sea route to India, the circuits of global trade realigned. Italy, which had once stood at the crossroads of global exchange, as the terminus of the land-based Silk Road, now became increasingly marginal to the flows of silver, sugar and enslaved labour that underwrote the formation of capitalism. The city-states were not involved in the silver mines of Potosí and Zacatecas, the sugar plantations of the Caribbean, nor the slave forts of West Africa which reshaped the architecture of global surplus extraction. In this new economy, Italy was no longer required as a conduit. Goods flowed directly from colony to core, bypassing the Venetian brokers and Genoese financiers who had once mediated exchange. The Italian peninsula,

politically fragmented and economically disjointed, could not compete with the national states and naval empires of the Atlantic.

Foreign control

After the fall of the Peace of Lodi with the death of its main architect Lorenzo de Medici in 1492, the continental powers fought to apply their hegemony over the Italian peninsula. The Italian Wars were ended in 1559 with the signing of the Treaty of Cateau-Cambrésis, which formalised Spanish Habsburg control over much of Italy. The Spanish Habsburgs controlled Naples, Sicily, Sardinia and Milan.

Spanish dominance preserved elite privileges and extracted surpluses and taxes to fund external wars. Spanish rule retained a vast agrarian economy in the south, which continued to be anchored to the *latifondo* system whereby tenant farmers and sharecroppers remained locked into feudal obligation. The role of Naples within the Spanish empire was to provision its military. Grain, olive oil and citrus were grown and exported in exchange for manufactured goods and luxury products (Tilly, 1992). Within this social system, the aristocracy that owned the vast *latifondo* guarded their ancient privilege and resisted any modernisation attempts. It became a space of imperial administration, rather than endogenous development. The peninsula remained strategically important in the world-system, but the function of that strategic importance had changed.

In the north, some residual dynamism remained. Florence, Milan, Bologna and Venice retained some financial infrastructure. Some institutional reforms in the eighteenth century were introduced, rationalising tax systems and liberalising trade. Yet this remained bounded by structural constraints. Italy continued to lack a unified market, a national currency and transportation network; its south looked westward to Aragón and Castille, while its north looked towards Austria. This fragmentation was geopolitically useful, not only for the European powers, but also for some vested interests within Italy. Fragmentation allowed the church, the nobility

and privileged segments of the merchant class to retain its local autonomy. In return for fealty, they ruled their fiefdoms as clients of foreign powers.

Reform

The eighteenth century in Italy was characterised by partial reform, strategic inertia and continued structural subordination within a rapidly transforming European world-economy. The great Atlantic empires of Britain, France and the Netherlands had entered their full mercantile-imperial phase, extracting and reinvesting capital from colonial possessions and domestic agrarian surplus. Italy, by contrast, remained a politically fractured space lacking the coercive institutions or fiscal capacity to industrialise. While some Enlightenment-inspired reforms were initiated in Italy, these occurred within the limits set by centuries of fiscal dependence, elite conservatism and peripheralisation.

Following the collapse of the Spanish Habsburgs and the War of Spanish Succession, under Austrian governance the northern states experienced a modest wave of bureaucratic rationalisation: improved cadastral surveys, codified civil laws, new educational institutions and minor land reforms. The goal was not economic transformation but greater administrative efficiency in a structurally stagnant region (Beales and Biagini, 2002). These reforms introduced elements of Enlightenment governance, but without dismantling the underlying class structures or fostering an indigenous process of accumulation.

In the south, the Bourbon monarchy reclaimed Naples and Sicily in 1734 and attempted its own programme of administrative modernisation. Reforms under Charles of Bourbon and his minister Bernardo Tanucci sought to rationalise taxation, centralise authority and diminish ecclesiastical and baronial power. They founded institutions like the Neapolitan Academy, expelled the Jesuits and encouraged scientific enquiry. Yet these reforms were mostly technocratic and urban, leaving the agrarian *latifondo* system

untouched. Southern Italy remained structurally underdeveloped, dominated by absentee landlords and a peasantry locked in cycles of seasonal labour, debt and revolt. This basic class contradiction remained unresolved. The Enlightenment in Italy was thus partial, uneven and largely administrative. While legal and philosophical critiques of absolutism were advanced, these ideas had little transformative effect in the broader political economy. The state remained weak and the ruling class risk-averse.

It was against this backdrop that the idea of national unification – *il Risorgimento* – took hold. The Napoleonic occupation of 1796–1814 had exposed the fragility of the old order and was the first attempt to impose territorial integration by force. Napoleon's armies abolished feudal privileges, introduced new administrative systems and for a brief moment created a united political entity across northern Italy. These reforms, though transient, broke aspects of the *ancien régime* and set precedents for later unification. Though the Restoration returned the old monarchies, the experience could not be entirely undone. The idea of Italy as a nation (however abstract) began to circulate in intellectual and political circles. Mazzini's republicanism, Cavour's constitutionalism and Garibaldi's radicalism represented different strands of a movement aimed at territorial unity and a national rebirth.

The Italian *Risorgimento*

*Occasionally we hear the word Italy, but it finds no echo
in people's hearts.*

Pietro Giordani, 1816

The Kingdom of Italy, proclaimed in 1861, marked the emergence of a modern Italian state. The *Risorgimento* was led by Piedmont, the only Italian region with the administrative and military capacity to unify the peninsula. Backed by northern industrial capital and supported diplomatically by France and Britain, Piedmont annexed central and southern Italy through war, plebiscites and

elite negotiation. This process integrated the previously sovereign political actors of the Kingdom of Sardinia,³ the Kingdom of the Two Sicilies, the Grand Duchy of Toscana, the Duchy of Modena and the Duchy of Parma. Further expansion of the new Italian state was undertaken in 1866 with the annexation of Veneto from the Austro-Hungarian Empire following France's victory over them, and in 1870 when Italian⁴ troops entered Rome. This led to the surrender of Rome and Lazio to the Kingdom of Italy and the absolution of the Papal States. Italian unification was finally completed in 1918 with the acquisitions of Trentino-Alto Adige – or Südtirol⁵ – and Friuli-Venezia-Giulia from the now-defunct Austro-Hungarian Empire.

The new state imposed national identity through standardised education, a national military and cultural centralisation around Tuscan Italian. The unification of Italy led to the elimination of tariffs and trade barriers between the formerly independent states. Capital began to move more freely and the state became the single political locus. Although the process that led to the creation of the Kingdom of Italy was described by the leaders of this movement as the 'unification' or 'resurgence' (*Risorgimento*) of Italy, the reality is that this process was driven primarily by one actor: the Kingdom of Sardinia (Riall, 2002; Smith, 1988).⁶ The *Risorgimento* is best described as the conquest of the peninsula by its most commercially advanced region: Piedmont. 'Piedmont was the furthest along the path to a market economy, with the most developed public administration and ability to indebt itself to pay for the best army. The internal

3 The Kingdom of Sardinia included Piedmont, which was the economic power of the peninsula.

4 These troops were from Piedmont and were in essence under the control of the Kingdom of Sardinia, they were therefore loosely Italian, rather than Piedmontese troops.

5 Südtirol has a German-speaking majority of inhabitants and possesses its own movement for its unification with the Austrian region of Tyrol. In fact, it was reported that 46 per cent of its inhabitants supported secession from Italy (Nationalia, 2013).

6 Although this entity was called the Kingdom of Sardinia, Sardinia had always been of secondary importance to its rulers, the House of Savoy. The capital was to be found in Turin, rather than Cagliari, and the strength of the kingdom was to be found in Piedmont and Genoa rather than Sardinia.

pressures on it to achieve larger markets and to spread its debt load over a larger base incentivised it to seek territorial expansion' (Duca and Duca, 2006, p. 823). This was not a popular plebiscite, but a unification from above; an elite project that in many ways left the existing class structures intact. No agrarian revolution occurred, no major redistribution of land was undertaken and industrial investment remained geographically skewed. While economic and political systems were standardised, it was the legal codes, taxation systems and educational structures of Piedmont that were imposed across the peninsula, often with little regard for local contexts. The south, in particular, was treated as a conquered province.

The creation of the Kingdom of Italy was therefore the product of a particular process of unbalanced integration, dominated politically by the Kingdom of Sardinia, whose predominance gave its ruling class control of the state apparatus. Unification in the Italian case 'was not so much a question of freeing the advanced economic forces from antiquated legal and political fetters but rather of creating the general conditions that would enable these economic forces to come into existence and grow on the model of other countries' (Gramsci, 2011, p. 76). This meant that the *Risorgimento* was an attempt to address the economic and structural weaknesses of the Italian peninsula. At its heart, it was an economic imperative.

The *Risorgimento* was therefore an economic revolution from above, rather than a specifically national-cultural revolution. While there may have existed an essence of cultural solidarity on the Italian peninsula in the form of a shared *ethnie* like that shared in the Hellenistic world, a strong, politically nationalist sentiment cannot be said to have existed before or during the *Risorgimento*. A sense of shared cultural-linguistic affinity might therefore have been an important justification for unification by the elite, but it was certainly not a pressing matter for many of the people on the peninsula.⁷ In fact, at the beginning of the *Risorgimento*, it is

⁷ Language may have been used to justify unification outwardly, but the main impulses behind unification were economic.

estimated that only 2.5 per cent of the population spoke what is today referred to as Italian.

The passive revolution

Passive revolution is a moment within the history and development of the state, whereby seemingly radical changes to society are in fact carefully managed in a way which preserves capitalist hegemony.

Daniel Evans

The movement for Italian unification was the expression of an elite frustrated by structural marginalisation. Piedmont, with its relatively modern army and bureaucracy, became the nucleus of the national project. But the *Risorgimento* was never a popular revolution. It did not involve a transformation of property relations. There was no mass redistribution of land, no assault on aristocratic privilege. It was a state-building project from above, not a class rebellion from below. Piedmontese institutions were imposed on the rest of the peninsula and with them came northern dominance.

Antonio Gramsci, the great Sardinian Marxist philosopher and politician was interested in conjunctures; historical moments whose effects have longer-term historical significance. It was from this starting point that he began to develop his notion of passive revolution and it was through this theoretical lens he came to understand the Italian *Risorgimento*. For Gramsci, the conjuncture that affected the *Risorgimento* was the French Revolution. This gave a lens through which to see the failure of Italian unification but also to see the history of Europe throughout the nineteenth century as a series of passive revolutions (Hesketh, 2017). The *Risorgimento* differed from the French Revolution because its leaders were Jacobin only in external form and did not make the demands of the popular masses one's own. The leaders of the *Risorgimento* differed from the Jacobins due to the weakness of the Italian bourgeoisie and the fact that they could not extend their hegemony over the popular masses. This weakness led to a mutual distrust between Italy's large

peasantry on one side and the newly emerging Italian bourgeoisie on the other. This reality meant that most Italians were passive in the events of the *Risorgimento*. The bourgeois–democratic impulses which in France found a Jacobin expression were in Italy ‘satisfied by small doses, legally, in a reformist manner – in such a way that it was possible to preserve the political and economic position of the old feudal classes, to avoid agrarian reform and, especially, to avoid the popular masses going through a period of political experiences such as occurred in France in the years of Jacobinism, in 1831 and in 1848’ (Forgacs, 2000, p. 266).

The *Risorgimento* and the roots of ‘the Southern Question’

The political unification of Italy was therefore steamrolled by the most economically advanced region of the peninsula. The economic insecurities that pressed on the Piedmontese elites to pursue political unification also persisted in post-unification Italy. The new Italian state looked westward to France and Britain as models of development to emulate and became alarmed by the rising strength of a newly unified Germany. The Italian intelligentsia believed that Italy, especially the south (or the Mezzogiorno), was much more economically backward compared to its European counterparts and addressing this backwardness was considered of primary national importance. Thus, the ‘Southern Question’ was born. The Mezzogiorno’s ‘backwardness’ was widely noted and discussed during the *Risorgimento*. The general sentiment was that

the agrarian system of the Neapolitan Kingdom seemed to hold the whole economy back, although agriculture was argued to be the country’s natural vocation. Wedded to antiquated crops, methods, and technologies, and resistant to innovation, the system was viewed as increasingly wasteful, inefficient, and even irrational. Critics lamented above all the persistence of ill-defined and confused property relations. (Schneider, 2020, p. 39)

The north's perception of the south is reflected in the work of Cesare Lombroso, the founder of criminology. Lombroso linked criminality to race and extrapolated these theories to explain the differences between north and south Italy. He claimed that the mafia was a Sicilian variant of the ancient Camorra, shaped perhaps by a tenacious adherence to secrecy which was supposedly typical of the Semitic race. He argued that Italy owed the greater frequency of homicides in Calabria, Sicily and Sardinia to African and eastern elements (except the Greeks), while the least occurred where Nordic races predominated. This process of othering was crucial in constructing a northern Italian identity. The south served as an 'other' against which the north defined itself. A version of hybridity, as described by Bhabha (2012) was evident. The south was both 'us' and 'them'. This reality created a tension at the heart of what it meant to be Italian. The south was perceived as both 'European' and 'non-European', yet essential to the construction of Italy: 'the South represented an "older" Europe that had to be reincorporated to fulfil a European identity grounded in "multiplicity"' (Agnew, 2017, p. 12). The south, therefore, belonged to two worlds.

While it is undeniable that illiteracy was widespread and that poverty, ill-health and insecure land tenures burdened the southern peasantry, the south should be placed within its historical context. The development and backwardness observed in the Kingdom of the Two Sicilies should not be viewed in stark opposition to a 'modern' north but as a relative condition encompassing both poverty and wealth, varying geological conditions and diverse cultures. In 1871, the Mezzogiorno had 85 per cent of the GDP per capita of the north; this was not an insurmountable gap, nor did it represent a dichotomous opposition between modernity and backwardness (Felice and Vecchi, 2015). Today, the Mezzogiorno's GDP per capita is less than 60 per cent of that of the north. For all the talk of a backwardness that had to be 'overcome', the *Risorgimento* in effect deepened and entrenched the differences that existed between north and south.

The southern economy

For over twenty-five centuries we've been bearing the weight of superb and heterogeneous civilizations, all from outside, none made by ourselves, none that we could call our own.

This violence of landscape, this cruelty of climate, this continual tension in everything, and even these monuments of the past, magnificent yet incomprehensible because not built by us and yet standing round us like lovely mute ghosts; all those rulers who landed by main force from every direction who were at once obeyed, soon detested, and always misunderstood, their only expressions works of art we couldn't understand and taxes which we understood only too well and which they spent elsewhere: all these things have formed our character, which is thus conditioned by events outside our control as well as by a terrifying insularity of mind.

Giuseppe Tomasi di Lampedusa

The creation of Italy was a compromise that sealed a class alliance between the northern bourgeoisie and the feudal elements of the south. The peasantry was excluded from the bourgeois revolution. While economic differences existed between the north and the south before unification, the Mezzogiorno's comparative economic 'backwardness' had been overstated, with the inequality between north and south worsening after unification. The Kingdom of the Two Sicilies had historically been ruled by absentee kings whose centres of power lay elsewhere. This changed for the first time in over 200 years when the king – Charles the Bourbon – decided to live and rule there personally in 1735. This continued when the kingdom passed to his youngest son. While the kingdom remained within the Spanish Bourbon dynasty, it was ruled as an independent cadet branch. This meant that finally the kingdom was ruled with its own interests in mind.

This changed once again with the *Risorgimento*. The Two Sicilies would once again become part of a larger state. The Two Sicilies had followed a protectionist economic policy, especially in its large agricultural sector, which safeguarded it against severe price fluctuations. The collapse of protectionism via the reduction of trade barriers in the newly created Kingdom of Italy adversely affected the south's economic position. It was unable to compete industrially with the north, while unification also destroyed the south's self-sufficient cereal agriculture. Instead, the south had to turn toward a specialisation in cash crops for agricultural exports and relied on the north's cereal and animal agriculture to feed its population. The north disfigured and deformed the south's mode of production but maintained the *latifondo* system now based on cash crops. The south's role was to accelerate accumulation in the north by enabling the extraction of surplus labour through the continued maintenance and reproduction of forms of exploitation that had originated in precapitalist social relations but had since been subordinated to capitalist accumulation (Amin, 1980a, p. 118). An agrarian revolution could have created the conditions for a different and unifying form of development, but inequality was built into the very foundations of modernist development in the Kingdom of Italy.

The industrial take off in the north was largely financed by surplus extracted by the south. The northern bourgeoisie through unification monopolised the fiscal and public finance systems of the south. The south paid a disproportionate amount of tax on both a population and wealth basis. The Mezzogiorno comprised 27 per cent of GDP and 32 per cent of the tax base, while northern Italy had 48 per cent of GDP but paid 40 per cent of the country's taxes. The Kingdom of Italy's new taxes on grain adversely affected the highly agricultural south by making bread more expensive for the peasantry. Taxes in the south were seen as a heavy-handed and disproportionate imposition by a foreign state. The peasantry looked instead to the Catholic Church to offer informal welfare and relief from the harsh practices of the

reactionary southern landlords to whom peasant farmers were indebted. Northern industrial and southern landlord interests had coalesced to create what Gramsci termed 'the historical bloc'. This bloc reinforced both northern industry and the landlords of large farm holdings. Effectively, the reactionary elements of southern society were supported by northern interests. The historical bloc derived both its strength and its fragility from Italy's passive revolution. Because the *Risorgimento* was not driven by a genuinely popular, mass, organic movement, it enabled an elite-led bloc to consolidate power without securing deeper social transformation.

Institutionally, the Kingdom of Italy created the Banca Nazionale nel Regno d'Italia (which derived from the Kingdom of Sardinia) and liquidated the Banco di Napoli and the fiscal institutions of the south. Concerning government spending,

between 1862 and 1897, 455 million lire were spent on landfills in Northern and Central Italy, while only 3 million were spent on such resources in the South. The majority of school and railway spending was also concentrated in the North. Development in the South certainly suffered after unification, and as a result, so did Southerners' relationship with the newly formed state. (D'Attoma, 2017, pp. 83–4)

In systemic terms, the unified Italy functioned as a structurally uneven national economy. The north, in areas such as Lombardy and Piedmont, experienced modest real industrialisation, backed by textile production, mechanical engineering and banking. Milan and Turin became emerging urban-industrial cores. The south, by contrast, was incorporated as an internal periphery. The Mezzogiorno was treated less as a partner and more as a zone of extraction and labour surplus.

The results from this unequal development were predictable. Military garrisons were deployed and any resistance was brutally suppressed. Anyone that dared challenge the way of things were

grouped as brigands, regardless of whether they were bandits, former Bourbon soldiers or armed peasant rebels. To merely call this brigandage is to miss that this was a rural war of resistance against a state that did not understand nor served the needs of the southern population. The new Italian state responded to resistance with martial law, executions and village burnings. The reform that was promised was abandoned while the way of life of the peasantry was delegitimised. What was framed as the ‘completion’ of national unification was, in fact, the forced incorporation of the south into the structures of the north.

Italian colonialism

By the late nineteenth century, Italy had become a marginal European power with imperial ambitions. The state launched colonial ventures in Eritrea and later Libya, not from strength but as a compensatory strategy to forge unity through external expansion. Italy was a latecomer and a weak player within the European theatre of empire. Italy had no colonial possessions in the Americas or Asia. In Africa, it colonised Eritrea in 1882, Somalia in 1905, Libya in 1912 and Ethiopia in 1936. ‘It was a weak player because she only managed to take leftovers of other colonial powers’ (Bertazzini, 2019, p. 17).

Italy’s comparative poverty compared to other European powers also affected how its colonies’ economic and productive capacities could be ‘developed’. While their treatment of native populations was no less brutal than that of their western European counterparts, ‘unlike France and Britain, the new Kingdom of Italy lacked the capital resources to sponsor and develop plantation colonies for economic exploitation’ (Choate, 2003, p. 65). Italy’s weaker internal economy could not ensure the availability of resources or markets for its colonial territories as Britain or France could. In economic terms, Italy’s colonies were not central to its development, partly due to the comparatively short period during which its colonies were under its control,

partly due to the lateness of the kingdom's empire and partly due to the comparative backwardness of the kingdom compared to European superpowers. For Italy, the role of empire was more psychological and social:

The belief that Italy was the cradle of European civilization played a significant part in the nationalist ideology of modern Italy from unification to fascism. This ideology aimed to both create a national identity and defeat internal differences in a country which was socially and culturally diverse and emerging from centuries of foreign domination, and where discontent and unrest not to mention poverty were widespread. (De Donno and Srivastava, 2006, p. 375)

The purpose of these colonies was to elevate Italy to its 'rightful' place in Europe and the world-system. In Europe, this meant an irredentism to bring Italian speakers under the Italian state, while abroad it meant creating links to the peninsula's Roman past in *Mare Nostrum*. Due to the comparative weakness of Italy's empire compared to the major European powers, the 'other' to which Italianness was compared came from within. Sociologically, this was espoused by Cesare Lombroso, who argued in *The Delinquent Man*, that criminality arose from 'abnormal' physical features. According to Lombroso, in the south, skulls tended to have an abnormally small circumference, wide cheekbones, a pronounced jawline, thick eyebrows and darting eyes. These 'characteristics' signified criminality. An American sociologist, William Ripley, similarly characterised ethnic differences in his 1899 book, *The European Races*. He identified three: the Teutonic, the Alpine and the Mediterranean. Lombroso's work aimed to position northern Italy within the 'Alpine race', distinct from the Italian south. This othering played a role similar to that of al-Andalus, providing a reference point against which 'true Italians' could be compared.

Fascist Italy and the post-war period

E quest'è il fiore del partigiano, And this is the flower of the partisan,
Morto per la libertà. Who died for freedom.

Bella, Ciao!

The roots of fascist Italy can be traced back to the *Risorgimento* and the historical bloc of the late nineteenth and early twentieth centuries. The lack of a popular foundation for the Italian state meant that it was always susceptible to any popular force from either the left or the right. Fascism became a means of containing the strains of modernisation by rallying a popular base around conservative aims; it was 'an attempt to make reaction popular and plebeian' (Moore, 1966, p. 477).

It emerged from a semi-peripheral state facing stagnation, international pressure and domestic discontent. The liberal bourgeoisie had failed to industrialise the south, integrate the masses or compete successfully in the world-system. Fascism stepped in not as a revolutionary rupture, but as a passive revolution by recasting old elites in new ideological garb. The fascist class coalition included industrialists threatened by labour militancy, rural landowners facing peasant unrest, a petit bourgeoisie destabilised by inflation and war, and the return of disillusioned ex-servicemen who served in the First World War. Mussolini offered them all stability through authoritarianism. Fascism crushed unions, outlawed strikes and reasserted elite control while presenting itself as a plebeian movement.

While the left resisted Mussolini and his fascist ranks, unequal development in Italy kept the rural masses of the south outside the proletarian battle. What was offered by the northern-based left-wing parties did not match their aspirations and ambitions. Furthermore, the northern proletariat were complicit in the super-exploitation of the southern peasantry. Yet it was not from the peasantry that the

fascist ranks swelled. As Morton (2007, p. 615) analysed regarding the elite-driven nucleus of fascism:

within the uneven development of the world market, the ideology of fascism was recognised as an attempt by the ruling classes in Italy – allied with a social base in the urban and rural petty bourgeoisie that was created as a result of transformations in rural property – to develop the productive forces ‘in competition with the more advanced industrial formations’. The political economy of fascism was therefore a response to ‘the intervention of Anglo-American capital in Italy’ that signified the growing predominance of finance capital over the state. ‘What is fascism, observed on an international scale?’, asks Gramsci, ‘It is the attempt to resolve the problems of production and exchange with machine-guns and pistol-shots.’

The rise of fascism was linked to Italy’s world-system position. Unification was intended to improve Italy’s relative standing within the global and European state-system. Instead, Italy found itself in competition with Anglo-American capital at home, had weak exports abroad and had no real colonial empire to speak of. Fascism was therefore a reactionary, passive revolution which attempted to improve Italy’s standing both domestically and internationally. As Gramsci stated, ‘is not “fascism” precisely a new “liberalism”? Is not fascism precisely the form of “passive revolution” proper to the twentieth century, as liberalism was to the nineteenth?’ (Morton, 2010).

In Italy, the outcome of the First World War swelled the fascist ranks. The war was originally viewed as a simple way for the Italian government to create a national consciousness, through military conscription and the establishment of a war economy geared towards national goals. The war was, in essence, a domestic political operation to overcome Italy’s weaknesses. However, the war dragged on for years, rather than being completed in months. The initial nation- and state-building efforts of the war eventually led

to disenchantment. The Italian government promised the masses that victory would lead to sweeping social changes. Safe to say, these changes were never forthcoming. Rather than the grand changes that were promised, the war exacerbated regional economic disparities in Italy by steering public procurement towards the industrial triangle of Lombardy, Piedmont and Liguria, and intensifying industrial production due to Mussolini's policy of autarky (Felice and Vecchi, 2015).

Fascist Italy and the changing Southern Question

Fifteen years of Fascism had erased the problem of the South from their minds and if now they thought of it again they saw it only as a part of some other difficulty. All of them agreed that the State should do something about it, something concretely useful, and beneficent, and miraculous, and they were shocked when I told them that the State, as they conceived it, was the greatest obstacle to the accomplishment of anything. We can bridge the abyss only when we succeed in creating a government in which the peasants feel they have some share. Plans laid by a central government, however much good they may do, still leave two hostile Italies on either side of the abyss. The difficulties we were discussing, I explained to them, were far more complex than they realized.

Carlo Levi

Southern Italy had been viewed as both progressive and primitive, internal and other, European and not European. This division of a dualistic Italian identity was overcome for a moment when the Fascist regime proclaimed its agenda of transforming Italy into a late colonial empire. Mussolini sought to restore Italian dominance over *Mare Nostrum*, culminating in Italy's fixation on the conquering of present-day Libya, Somalia and Ethiopia. Italy's internal other – the south – gave way to an external one. Before the rise of fascist colonialism, Italy did not possess an external other to racialise. During the fascist period, public intellectuals and political

leaders constructed the notion of a unitary national identity. The complexities that composed the Italian nation were obliterated, bridging the gap between north and south:

Intellectuals and political leaders came to construct a representation of a unitary national identity. Only then did the many complex elements that composed the Italian nation come together to affirm that identity, overriding and obliterating the rhetorical strategy of an Italy divided between North and South. In the international upheavals of the 1920s, when the nation-state of Italy was in fact quite fragile, the Fascists generated the collective dream, indeed delirium, of achieving superpower status, giving birth to a national identity that had been up to then paradoxical. North and South as enemies did not figure in the everyday discourse of fascist intellectuals. An image of Italy as a utopian project, a hazy veil that hid complex differences, grew to cover the entire national territory. The Southern Question gave way to the rhetorical figure of Italy defined as the direct descendant and inheritor of Imperial Rome. (Pandolfi, 2020, p. 285)

Fascist Italy was therefore nostalgic for an imperial past and anticipated an imperial future. This sentiment had its roots in the *Risorgimento* period. Political leaders such as Francesco Crispi conjured images of virgin colonial lands to exploit, displacing the exploitation of the Mezzogiorno onto the colonies. In the end, this idea tumbled like the house of cards that it was. The Second World War saw the fall of fascism but the differing experiences of north and south in the final years of the war further muddled the notion of a unified Italy. The south's liberation began at the end of 1943 with the American landing in Sicily.⁸ The north, on the other hand, continued under the control of Mussolini until his execution by partisans in April 1945. This two-year difference meant that

8 The coffee drink 'Americano' originated from this period. The short espresso was too strong for American soldiers posted in Italy, who therefore preferred a longer black coffee.

there was no coherent representation of the Italian experience during the Second World War. Marxist historiography highlighted the resistance of the partisans, while anti-communists viewed these same partisans as traitors who brought down the Italian state.

Italy in the world-system after 1945

The post-1945 period was transformative for Italy, as the country emerged from the devastation of the Second World War and the collapse of fascism into a new international order dominated by Cold War geopolitics and rapidly evolving global capitalism. Italy's economic and political reintegration into Western alliances, such as NATO and the European Economic Community (EEC), reshaped its domestic economy and regional structures.

In the immediate post-war years, Italy received significant aid under the US-led Marshall Plan, intended to stabilise western Europe and prevent communist influence. This influx of capital helped rebuild key northern industrial sectors such as steel, machinery and automobiles. It also encouraged Italian participation in Western economic cooperation, setting the stage for Italy's later accession to the EEC in 1957.

The 1950s and 1960s witnessed what historians term the Italian Economic Miracle, with rapid industrial growth concentrated in the northern regions of Lombardy, Piedmont and Liguria. This period saw the rise of large-scale manufacturing firms such as Fiat and Olivetti, which adopted Fordist mass production methods. Fordism, characterised by standardised production and assembly line labour allowed for unprecedented productivity gains and wage increases, creating a new working-class consumer base. Yet, European integration was a passive revolution: it was an attempt to continue the privileged position of Europe within the world-system and it was an acceptance that European countries could no longer maintain their position by continuing as individual nation-states. By pooling together, these states attempted to stabilise their world-system position. Integration maintained the core position of the

major European regions of production qua peripheral zones. The privileged position of capital and capitalists within those countries was maintained.

European integration was a revolution from above and from outside. The United States were ardent supporters of the concept and Marshall Plan aid was tied to pan-European cooperation. The Committee of European Economic Co-operation of 1947 determined European-wide priorities for European recovery and specified how to administer Marshall Plan aid. Following this committee, the Organisation for European Economic Co-operation was formed in 1948. This was the precursor to today's Organisation for Economic Co-operation and Development (OECD). External stimuli, therefore, namely the 'threat' of communism and the USA's new global hegemony created the conditions for European integration. Integration was also a revolution from above because 'it was essentially a project of and for the political and capitalist economic elites of Europe, creating a new space for capital accumulation and a new political territory that would allow those who ruled it to have an equal voice with the USA and USSR on the world stage' (Hudson, 2017, p. 139).

Italy's membership in NATO from 1949 positioned it as a frontline state in the Cold War, attracting US military investment and political attention. Northern Italy hosted key military bases and industries linked to armaments and aerospace. This military-industrial complex further entrenched northern industrial dominance while offering limited benefits to southern regions, which remained strategically marginal.

From the 1960s onward, Italian multinational corporations expanded their operations globally, investing in emerging markets in Latin America, Africa and Asia. This outward investment reflected Italy's increasing integration into the capitalist world-economy. Firms such as Fiat developed transnational production networks, leveraging cheap labour abroad while maintaining high-value operations in the north. While global expansion generated profits for northern capitalists, it did not translate into substantial benefits

for the southern economy. Instead, the south remained a labour reserve and supplier of raw materials, reinforcing its peripheral status in both national and global hierarchies (Arrighi and Saul, 1973).

Liberalism chooses the right

The political economy of post-war Italy therefore cannot be understood without placing it within its international context. Across western Europe, the spectre of communism was feared by all ruling classes. This fear was particularly strong for the Italian ruling class, and for good reason. Between 1948 and 1987, the Partito Comunista Italiano (PCI) finished second in every general election. However, the initial anti-fascist front following the war gave way to the expulsion of socialists and communists from government in 1947. This led to a situation whereby the communists were supported by roughly one-third of the population of Italy while simultaneously being locked out of government for the entire period. A bloc of interests coalesced around northern industrialists and a system of personal patronage to the Christian Democratic Party (linked to the church) in the south. This allowed the notion that the communists were ‘traitors’ during and following the Second World War to fester. Italy’s politics in the post-war period was therefore directly shaped by the world-system and its position within it. On one hand, there was the PCI, which was perceived to be aligned with the eastern bloc and, on the other, there was the Partito Socialista Italiano and the Democrazia Cristiana, who tended to call for class unity rather than class struggle, as was the liberal post-war tradition. This reality was clearly supported by the position of the United States, which now as global hegemon had created terms and conditions for the rebuilding of Europe. The communists that had given so much to the liberation of Europe and the world were now denied access to this bright new future. No Marshall Plan funding was given to the eastern bloc, which was mostly responsible for the collapse of Nazism, while the communists in southern and western Europe were locked out.

Marshall Zhukov was very astute when he observed that ‘we have liberated Europe from fascism, but they will never forgive us for it’.

The Cassa per il Mezzogiorno

Italy received roughly 11 per cent of the total Marshall Plan aid. This aid gave new impetus to Italian politicians to finally ‘solve’ the *questione meridionale*. In 1950, the *Cassa per il Mezzogiorno* (Fund for the South) was created: a government body specifically designed to stimulate growth and development. This was a policy that recognised the importance of place in economic development. The fund was initially established to administer Marshall Plan aid and emerged from a changing attitude toward poverty and development. Areas of the south, such as Matera, became known as ‘Italy’s shame’. However, what was now deemed shameful was that governments had allowed people to live in such poverty for so long, rather than poverty itself. This shift in perspective was supported by writers such as the communist Carlo Levi, who wrote his book *Christ Stopped at Eboli* (2006, p. 18) about his time spent in the south during the fascist era. He stated:

They live submerged in a world that rolls on independent of their will, where man is in no way separate from his sun, his beast, his malaria, where there can be neither happiness, as literary devotees of the land conceive it, nor hope, because these two are adjuncts of personality and here there is only the grim passivity of a sorrowful Nature. But they have a lively human feeling for the common fate of mankind and its common acceptance. This is strictly a feeling rather than an act of will; they do not express it in words, but they carry it with them at every moment and in every motion of their lives, through all the unbroken days that pass over these wastes.

This passage addresses the structural reasons behind poverty, noting that such conditions occur ‘independent of [the] will’ of the poor and asserts that it is impossible to live completely and freely

while such suffering persists. The *Cassa* would therefore serve as a national policy aimed at eradicating this poverty and ending Italy's shame.

The *Cassa per il Mezzogiorno* (1950–84) was acutely aware of the challenges it faced in addressing the south's underdevelopment. A 1953 report noted that 85 per cent of the poorest Italian families lived south of Rome (Forlenza, 2010). Due to the south's underdevelopment by the north, the *Cassa* was initially tasked with building essential infrastructure such as roads, housing and access to water. In its early years, the fund achieved notable success. It overhauled the Mezzogiorno's antiquated agricultural sector, which included 'mechanization, extension of irrigated areas, and the introduction of fertilizers, sustaining an absolute growth in productivity and production for at least twenty-five years' (Alacevich, 2013, p. 101). Consequently, between 1952 and 1961, the Mezzogiorno's growth rate was 5.2 per cent per year. While the fund initially focused on primary agricultural production, by 1957 it began to favour labour-intensive steel, chemical and petrochemical industries. This shift also seemed successful. According to Bank of Italy estimates, between 1947 and 1983, production per capita in the south increased threefold (Davis, 2020). Despite these improvements, however, Italy's dualistic economy persisted.

While Marshall Plan aid was crucial in establishing and funding the *Cassa*, most of this aid did not benefit the south directly. The primary objective of the plan was to support the reconstruction of production systems in Italy and Europe more broadly. The pre-existing imbalance favouring northern industries persisted under the Marshall Plan. While the Mezzogiorno's growth rate averaged 5.2 per cent per year between 1952 and 1961, it was 5.9 per cent in central and northern Italy, meaning that the gap between them widened. The growth that did occur was not embedded within the south's structures; its internal linkages remained weak and fragmented compared to the north.

These spurts of development were driven from outside rather than being endogenous to the Mezzogiorno, mirroring the reality

of southern integration into the Italian state. While workers in the Mezzogiorno benefitted from government funds, new industries and agricultural modernisation, northern capitalists gained more. Large plants established in the Mezzogiorno were branches of northern-based industrial plants. Their supply chains favoured traditional northern partners over new southern businesses. Southern factories were ‘Cathedrals without pillars’ (Andreoni, 2013, p. 303) due to the lack of internal linkages. The Mezzogiorno suffered from a lack of control over investment and decision-making. Factories were branch plants in less capital-intensive industries with lower wages than their northern counterparts. This absence of indigenous firms in the Mezzogiorno persists today: of the twenty-seven Italian companies on the Forbes 2,000 list, all but one are based in the north, with the sole exception being a small oil and gas company from Sicily, ranked 1,985th (Forbes, 2023). Southern Italian development was dependent, with strategic industrial policy created in the north.

While there existed an industrial network of manufacturing firms in the Mezzogiorno, its local systems of production were characterised by a scattered presence of firms producing intermediate inputs and investment goods. By analysing the degree of completeness of the value chains, Bronzini et al. (2013) showed that the linkages in the south – measured in terms of additional workers activated – are seldom greater than half the number observed in the Italian north. In effect, the low density of its value chains

makes the Southern industry dependent on external inputs: the leak of imports from the Centre-North weakens the correlation between the expansion of industrial production and the growth of the chain. Finally, a much higher share of firms in the Southern value chains is in a weaker contractual position compared to their Northern counterparts. (Guarascio and Simonazzi, 2016, p. 317)

Mirroring the economic functions of the core and periphery in the world-system, the Mezzogiorno specialised in resource-intensive sectors such as agricultural and food products, wood and

petrochemicals. In contrast, the north's exports included mechanical machinery, transport equipment, metals, chemical products and textiles (Buch and Monti, 2010, p. 669). The *Cassa per il Mezzogiorno* was an attempt to address these imbalances, but it failed due to the economic strategies employed. The processes in the Mezzogiorno during this period can be described as growth without development. As Flammang (1979, p. 50) argued, 'growth' refers to the expansion in size of something, while 'development' pertains to a change in its characteristics. The south's economy 'grew' during this period but did not 'develop'. The fund was discontinued in 1984, partly due to its failure to stimulate development in the south and also due to EU competition laws, which made it more difficult for governments to intervene in economic matters that 'distorted' market competition (Kiljunen, 1980, p. 212).

Italy since the 1990s: the nationalism of the north

Lombardy is a nation, Italy is just a state. All the Milanese are fed up thanks to the Roman power that imposed on us systems of life that we do not want. The Lombards are treated like slaves, Lombardy is a cash cow. Parties are the instrument through which the southerners manage the state.

Umberto Bossi, former leader of Lega Nord

If a national movement for independence was to be seen in Italy, one would expect to find it in the south. Apart from Sardinia, the entire Mezzogiorno was part of the same political entity for centuries before the unification of Italy. It is the region that most closely resembles a nation. It is the area that has fared the worst since unification; it had its own capital in Naples and has continually been othered by northern Italians. The relegation of the Mezzogiorno's political institutions to the past might explain this phenomenon. It can no longer refer to its civic identity and continuity with the Kingdom of the Two

Sicilies and thereby relegating its identity to a cultural rather than political one. In the north of the country, a vibrant ‘independence’ movement has developed. Calls for northern autonomy grew rapidly over a short period. Autonomists went from being fringe players to a major political force in the 1990s. Their political party – the Lega Nord – even entered the national government as a minority partner under Silvio Berlusconi’s premiership.

Padania: inventing a nation

The name given to the new ‘nation’ in northern Italy is Padania. Padania derives its name from the River Po, which runs like a scar through the north-west of the country. Independence is promoted by the Lega Nord (The Northern League) – or, to give its full name, Lega Nord per l’Indipendenza della Padania (Northern League for the Independence of Padania) – which was established in 1991 from an amalgamation of different leagues or parties in the north, such as the Liga Veneta, Lega Emiliano-Romagnola, Lega Lombarda and the Alleanza Toscana. Although the Lega Nord has invented a new identity for the north, this identity is based on the long-standing, entrenched perception of cultural differences between the north and south.

‘What is remarkable in the case of Northern Italy today is that we can see before our eyes the attempted invention of an identity that has had no prior existence’ (Agnew and Brusa, 1999, p. 126). The Lega represents a rupture from earlier Italian politics, stemming from their distinct political aspirations. The goal of the Italian polity from the *Risorgimento* through to the post-war era – at least outwardly – was to overcome the difficulties in development across all of Italy and to elevate the living standards of all Italians to those enjoyed in western Europe. The Lega, on the other hand, contend that the difference between the north and the south – both culturally and economically – is too great, meaning that the north constitutes a separate people. The pseudo-scientific usage of genealogy and geography has played a significant role in creating a Padanian

nationalism which has attempted to root itself in Celticity. It asserts that northern Italians are northern European and part of the wider European pan-Celtic family. This implicitly means that they are white and distinct from southern Italians. There has even been a duality created in the social construction of 'the Mediterranean' in that it exists on the margins of being both European and non-European. This duality is central to understanding Italian cultural identity and the otherness implied in the north-south divide. The Lega and its supporters have attempted to eschew the Mediterranean entirely, and in this regard, the Mediterranean is central for some northerners in defining 'what they are not'. For example, on the Lega's website, the following was stated:

All the peoples of Padania descend from the same original ancestors, which can be categorized into three principal groups: the first and the oldest are the Ligurians; the second group are the Celts and the Venetians, which come from diverse areas but have similar cultures and traditions; and the third group are the Goths, the Longobards and all the other Germanic peoples that inhabited the North of Italy. In contrast, the ancestors of the Italians are the Etruscans and the Greeks, which were the dominant cultures of the Italian peninsula. (quoted in Hague et al., 2005, p. 164)

This purportedly different ancestry between north and south has led to divergent cultures and mentalities between the two Italies. The Lega Nord argues that northerners possess a stronger work ethic, are more entrepreneurial and are more law-abiding. This is contrasted with the supposed characteristics of the south: laziness, dependency on government handouts and a propensity for criminality. In effect, northern Italians are seen as culturally northern European, while the south is deemed culturally Mediterranean. According to the Lega, the relationship between culture and economy is such that different cultures have led to different economic outcomes. The north is richer due to its distinct culture and lineage, which the Lega views as the primary reason for economic disparity. They believe

that this cannot be overcome as it is inherent to the south and the Mediterranean.

When analysing Padania, it is crucial to consider the cultural and geographical ambiguities inherent in its definition. Figure 8 illustrates the difficulty in defining the geographical parameters of Padania for Lega leaders. On the right, areas of Umbria, Marche, Tuscany and Emilia-Romagna are included within the new nation, even though the River Po does not flow through these regions. More ironically, some of these regions were to be paired with Lazio in their proposal for a federal Italy: Lazio represents the Lega's grievances through their notion of 'thieving Rome'. Additionally, Padania encompasses German-speaking regions of Italy, such as Südtirol, which also seek more autonomy. It appears that the Lega's definition of inclusion within Padania is based more on economic wealth than on any cultural or geographic marker, as demonstrated in Figure 9.

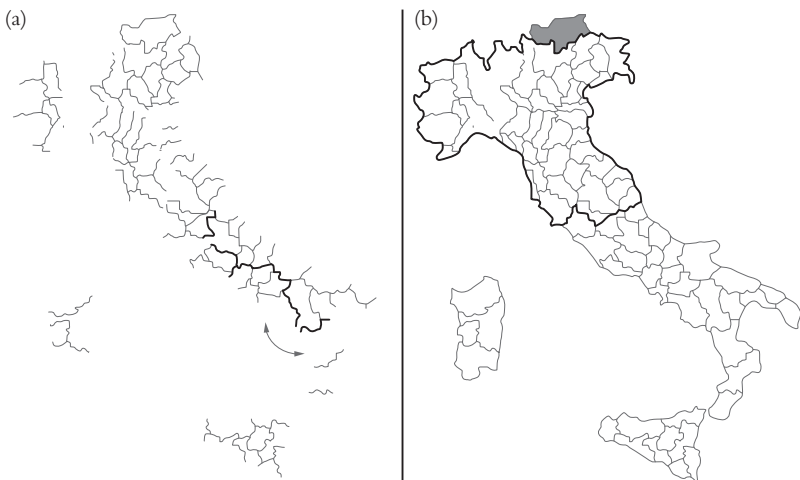


Figure 8: Two of the Northern League's territorial schemes: (a) regions for a federal Italy proposed between 1994 and 1996 and (b) Padania, the 'unit of choice' since 1996 (Agnew and Brusa, 1999, p. 121).

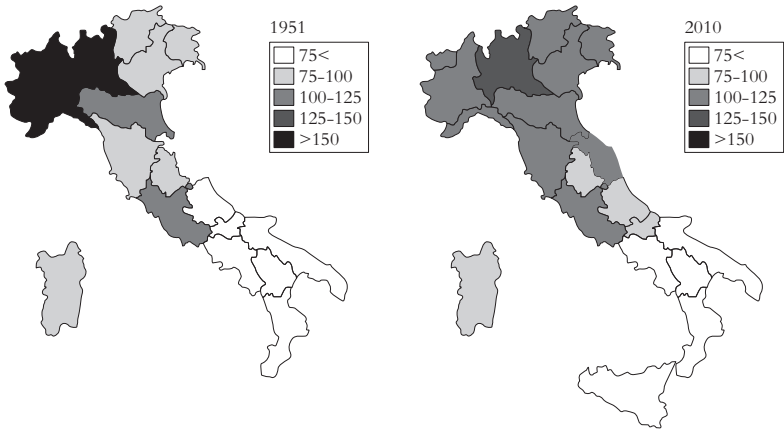


Figure 9: Regional GDP per capita 1951 and 2010 (Italy = 100) (Daniele and Malanima, 2014, p. 169).

It's the economy

Inventing an identity is a crucial aspect of legitimising grievances. In the case of Padania, its identity was originally shaped as a refutation against the south. Yet underpinning all the apparent cultural, genealogical or geographical peculiarities in Italy was the economy.

The locus of the Lega Nord's strength is in exactly those parts of Italy which pushed for the creation of the Kingdom of Italy. On the surface, the case of Padania seems particularly idiosyncratic in that it calls for independence from the very state its ancestors helped to create. These seeming idiosyncrasies become more typical when the economy is considered. Lega has inverted Italy's economic reality, arguing that the north suffers from economic victimisation. While it is essential not to draw too strong a comparison between Catalan grievances and those of Padania – especially as Catalan politicians do not use the inflammatory, racist language of the Lega Nord – some of their supposed grievances are comparative in content, if not in form. The Lega continually allude to the perceived unfairness in Italy's tax and spending system, claiming that northerners receive less than southerners. Per-capita state expenditure is roughly proportional to the population of the north and south, and while the

north does contribute more than the south, this is due to its greater wealth. This echoes the Catalan grievance that money is transferred from Catalonia to other parts of Spain, yet this too is proportional based on wealth. Both movements thus dislike the redistributive elements of their respective states, but they seem to disregard the historical, geographic and economic factors that contributed to their comparative advantages in the first place.

Linked to the above, the Lega continually alludes to the ‘domination’ of the state apparatus by southerners and the patronage systems that exist between politicians and people in the south. At face value, both points hold some merit, particularly when viewed from an ahistorical perspective. First, the larger percentage of southerners within state organs highlights differing avenues to employment in the north and south. Public sector pay is equalised across Italy, while private sector employment remains more scarce and poorly paid in the south (Alesina et al., 2001; Pagani, 2003). The propensity of southerners to work in the public sector cannot be divorced from the north’s history of using the south as a resource for cheap labour and markets. Moreover, the patronage systems that undeniably existed between the Christian Democrats and vested interests in southern Italy were initially created during Italy’s historical bloc, when the interests of northern industrialists and southern landowners coalesced. Personal fealty and patronage, which kept much of the southern population pliant, were therefore policies initially supported by northern interests and should not be viewed in isolation. Figure 10 shows the continuing per capita differences between the north and south of the country. Within this context, it is understandable why the south should receive redistribution from the north.

Figure 11 starkly represents the persistence of regional disparities within Italy. The bottom eight positions in 1995 are the same eight in 2019; all within the Mezzogiorno. Only Lazio – starting in seventh place and ending in sixth – is higher than any single region within Padania. Twelve of the thirteen highest-placed regions are in Padania. Lazio breaks this pattern only due to its status as the capital city and the centre of world Catholicism. Nonetheless, it still cannot surpass

the dominance of the north. This fossilisation could be excused if the wealth gap between the wealthier and poorer regions was being reduced. However, in 2000, the average wage in the Mezzogiorno was 56 per cent of that in north and central Italy; by 2019, this figure remained at 55 per cent. Not only has there been no change in the relative regional position, but regional inequality has also persisted.

Adopting an EU-wide perspective reveals stark regional GDP disparities. In 2000, the Mezzogiorno was among the eight lowest-ranking regions, with only one region (Abruzzo) having a GDP per capita higher than the EU average (104 per cent). Padania, on the other hand, ranged from 170 per cent of the EU average at its highest to a 'low' of 112 per cent (Marche). By 2019, the relative GDP per capita of each Italian region worsened, causing the Mezzogiorno to fall even further behind the EU average. For instance, Calabria's GDP per capita dropped from 71 per cent of the EU average in 2000 to 56 per cent in 2019. While Padania's relative position also deteriorated, ten of its twelve regions still had above-average GDP per capita in 2019; the exceptions were Umbria and Marche, unsurprisingly the two Padanian regions closest to the Mezzogiorno and furthest from the north.

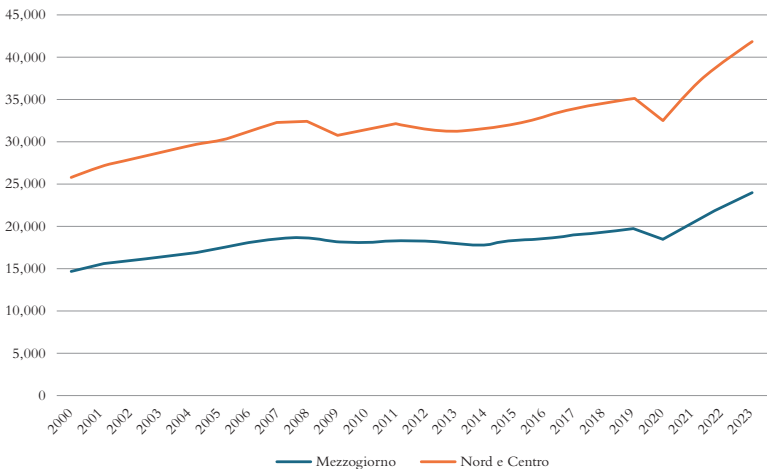


Figure 10: GDP per capita by year (Euros at 2019 prices) (author's own).

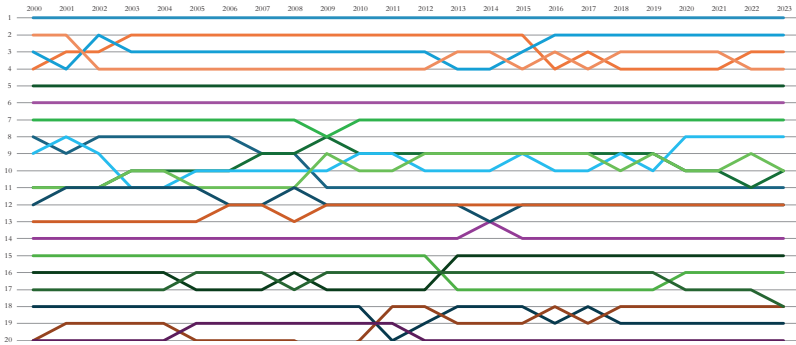


Figure 11: GDP per capita ranking by region, Italy 1995–2023 (author’s own).

The international context

The final question to address is why it was only in the 1990s that the strength of Lega increased. The duality between north and south Italy is as old as the creation of the Kingdom of Italy itself. So why has the Lega Nord only risen to prominence in the last 30 years? It is no exaggeration that the example of the Soviet Union had a significant impact on Italy throughout the 20th century; an external factor influencing Italian society. The Partito Comunista Italiano was consistently the second-largest party in the post-war period. This meant that all other parties – both right-wing and ‘left-wing’ – were in a fragile alliance against the communists. This situation applied to both Italian-wide parties and regional parties from the north and south. The spectre of communism haunted post-war Italy, making national unity in the face of a broader ‘threat’ paramount. It is no coincidence that the Lega Nord rose just as the Soviet Union was collapsing; no longer was the PCI the second-largest party and no longer did Italian unity overshadow regional interests. The dissolution of the Soviet Union represented, in Gramsci’s terms, another ‘punctual point’ in history.

The second international factor was the deepening and widening of the European project. The Lega has a complex and contradictory history with the EU. Before Italy's incorporation into the European Monetary Union, the Lega was a strong supporter of the north joining the Euro, but not the south. They believed that the EU's economic liberalism would benefit northern capitalists, provided the north was not burdened by the south's economic uncompetitiveness. More recently, the party has become increasingly Eurosceptic; not regarding the EU's economic policies, but rather the perception of a bloated bureaucracy that serves the interests of larger states (ironically, these states are considered to be France and Germany, not Italy). The Lega therefore advocates a particular vision of Europe based on the Committee of the Regions, which would offer smaller states the flexibility needed to navigate economic challenges. The EU's Committee of the Regions was founded in 1994, coinciding with the rise of the Lega Nord. The European avenue provided legitimacy to the party and somewhat detoxified it by allowing collaboration with 'similar' parties. Thus, the rise of the Lega Nord is rooted in long-standing regional disparities dating back to the creation of the Kingdom of Italy, but it was the shifting global context – particularly the collapse of the Soviet Union – that enabled such a party and idea to emerge at this specific historical juncture.

Conclusion

The Italian experience compels us to reconsider the foundations of development, sovereignty and transition. Italy's failure to modernise, its missed industrial revolutions, and its belated national unification, is due to a history of structural impasse. The very conditions that made Italy brilliant in one era rendered it semi-peripheral in the next. The city-state system, the maritime republics, the Renaissance courts and the high cultures they produced were not preludes to capitalism, but rather historical formations rooted in their own

feudal and commercial logic; self-contained, dynamic, but ultimately bounded.

The Italian peninsula existed for centuries as a fragmented space of overlapping sovereignties and partial autonomies. Its geography reinforced this segmentation, while its economic structure embedded it as an intermediary node in the Mediterranean system of circulation. Northern cities could dominate trade routes, control banking and finance crusades, but they could not command a national market, nor could they mobilise a landless proletariat. Rural society remained structurally unchanged. Agrarian relations continued to follow feudal logics, and the guild system in the cities restricted innovation to preserve social order and artisanal prestige. The city-state remained the dominant political form because no alternative was systemically possible within the inherited geography and class structure.

Italy's role was central to the functioning of the Mediterranean world-system but when that gave way to the modern world-system based around the Atlantic, Italy's role was diminished. It lacked both the political unification and the fiscal-military state necessary to project power abroad. The newly emergent Atlantic core redrew the map of global trade. Italian politics were bypassed because they were no longer required. The Mediterranean was abandoned by history.

The *Risorgimento* emerged in this context not as a revolutionary break but as a managed integration of the peninsula into a broader capitalist world-economy. It was not a popular, but a passive revolution: a consolidation of elite rule under the banner of national unity. The economic dynamism of the north subsumed the agrarian and uneven south into a project that promised much but only delivered a condition of dependency. The state that emerged served the interests of the northern bourgeoisie and southern landlord elites, reproducing the same class structures that had shaped the peninsula through the *longue durée*.

Italy shows that capitalism does not emerge wherever markets exist, but only where social relations of production are transformed.

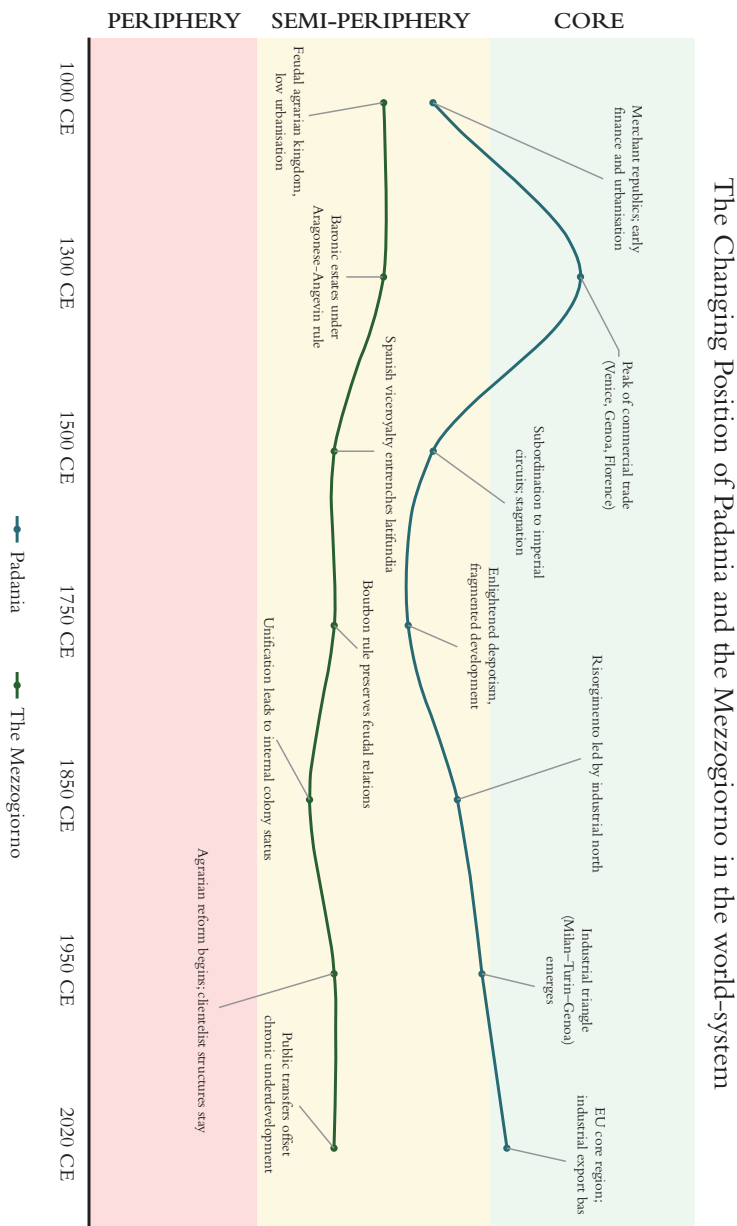


Figure 12: The changing position of Padania and the Mezzogiorno in the world-system (author's own).

It also shows that the nation-state is more an expression of class power than the inevitable product of shared culture. To write the history of Italy is not to trace a golden thread from antiquity to nationhood. It is to map a terrain of multiple paths, most of which led away from consolidation and transformation. It is to see in Italy a palimpsest of systems: Roman, feudal, commercial and colonial with each layering over the last without erasing it. The peninsula remains a space of immense complexity: where old and new co-exist, where the dreams of unity compete with the realities of division, and where historical time moves slowly.

Italy's story is a different tale of modernisation. One that reveals the limits of teleology and offers instead a view of the world where constraint is as important as possibility, and structure as determining as agency. It is, above all, a history that can only be understood in relation to the world-system to which it has always belonged.

WALES AND BRITAIN



Figure 13: The Marcher lordships and the Principality of Wales in the fourteenth century (Lieberman, 2010).

Historians are no longer wedded to the idea that sovereign states are the supreme end-product of the historical process or that they and the relations between them are the only phenomena worthy of the historian's attention. The study of the sovereign state remains very important, but it is only one among several collectivities which can engage the historian's attention. For that matter there is nothing sacrosanct about the history of a nation either. But it is an interesting and rewarding subject, particularly when you can trace down the centuries the subtle and elusive problem of how an ancient and distinctive social and cultural ethos is maintained or modified within a wider political framework. But the justification for Welsh history, or any other history, is not that it bolsters patriotism or national consciousness. It is the sober historical fact that the Welsh have a history of their own which, despite its close links with that of the other British peoples, is in marked respects different. It cannot be understood as a regional fag-end of the history of England. Its connecting thread is not political or constitutional history but social development.

Glanmor Williams

How should the historian approach a nation without a state? A people who have remained, across centuries, structurally subordinate but culturally distinct? A land where the terrain itself seems to conspire against centralisation, and where conquest rarely produces full assimilation? Wales poses these questions in acute form. It is a country often included as an afterthought in the histories of Britain, as an 'irritating anomaly or inconvenient anachronism' (Clark, 1989, p. 212). Yet the experience of Wales offers a vantage point from which to rethink the spatial, ecological and economic processes that have shaped the modern world. To study Wales is not to add a national voice to a wider state history. It is to confront the unevenness of historical time, the weight of geography and the long rhythms of political economy.

The history of Wales demands a *longue durée* approach which is capable of holding together the slow movement of landscape and

demography with the sharper *conjunctures* of conquest, rebellion and industrial transformation. The *longue durée* refuses to isolate the event from the structure, the political episode from the ecological foundation. It treats the economy as a historically embedded pattern of material and social reproduction. We must look beneath the surface of sovereignty and dynastic politics to the underlying constraints imposed by terrain, resource distribution and systemic location.

A history of Wales must also place it within wider systems. The Welsh experience is rarely the product of a coherent internal development, but of its structural position within consecutive world-systems. Whether as the Celtic periphery of the Roman Empire, the frontier zone of Anglo-Norman conquest, or the extractive hinterland of British industrial capitalism, Wales has been shaped by its incorporation into larger structures of power. To understand this incorporation is to ground Welsh agency and identity within the social and material realities within which they existed. Cultural forms, legal institutions and social movements emerge within and against the grain of structural subordination.

The focus of this chapter is not simply what happened in Wales, but more on how processes of accumulation, integration and resistance unfolded in and through Welsh society. The emphasis is on relations. Of class, core and periphery, ecology and economy, land and labour. Wales is treated here not as a static cultural unit, but as a social formation: a historically contingent assemblage of people, landscape, property relations and institutional forms, embedded within shifting systemic totalities.

The importance of geography in this story cannot be overstated. The mountainous spine of Wales structured the terms upon which resistance, economy, political life and society could develop. In a pre-modern world where mobility and surplus were limited, the ecological configuration of Wales rendered it fragmented and difficult to govern. The result was a society marked by dispersed settlements, transhumance and an ecological situation that was always at the margin of self-sufficiency. The same terrain that

hindered centralisation also provided resistance to invasion. It is no coincidence that the Welsh language endured longest in the most mountainous and least accessible regions. Linguistic geography was shaped by material geography. The further one moved from the market towns and port cities of the English border and the south coast, the stronger the cultural resistance to anglicisation.

The emergence of modern Welsh nationalism, however, should not be viewed as being born from primordial goo. Instead, it is a demand for self-determination within a system that historically denied it. The nation is an imagined political community that is capable of controlling its own conditions of reproduction. Yet the very possibility of such control remains conditioned by Wales's continuing dependence.

To understand these dynamics requires attention not only to political events, but to class structure. We must ask who owned the land, who worked it, who moved its products, who appropriated its surplus? These questions must be asked not only in the era of capitalist industry, but also in the earlier forms of feudal and customary economy. How was surplus mobilised in a pastoral society? How were tenants bound to lords, and lords to kings? What changed when that surplus was no longer consumed locally but extracted for external markets? How did the rise of leasehold, the enclosure of commons and the destruction of customary tenure reconfigure the Welsh countryside? What forms of resistance emerged in response?

Finally, this text poses a question that reaches beyond Wales itself: how do we write the history of nations that never became states? There are many societies whose histories have been rendered invisible by the dominant frameworks of national historiography. To write Wales from the standpoint of political economy and the *longue durée* is to offer a model for such histories: not as adjuncts or caveats to the stories of larger powers, but as histories in their own right, grounded in ecology, economy and struggle. It is to ask not what Wales contributed to British greatness, but how it was shaped within the political and economic systems that bound it.

Geography

Wales is a land of mountains. Its mountains explain its isolation and its love of independence; they explain its internal divisions; they have determined throughout its history, what the direction and method of its progress were to be ... Its history, from beginning to end, is dominated by the mountain ... While races and language go, the mountains remain. And they give a unity of character to the people who live among them.

O. M. Edwards

*I'm not sure who I am
in the fertile, peat-free lowlands.*

*My red blood for hundreds of years
knows there is difference between land and land.*

*But I know who I am if I can have a hill
and peatland and reeds and rocks and lakes.*

T. H. Parry-Williams

The defining feature of the Welsh landscape is its inaccessibility. The mountains of Eryri, the Cambrian spine, the moorlands of mid Wales and the deeply entrenched river valleys have created a social geography that resists centralisation. The infertility of the upland zones makes the capacity for agricultural surplus limited while the lowland areas of Monmouthshire, the Vale of Glamorgan and the Teifi basin are both more fertile and scarcer.

To the west of Wales lies the Irish Sea, and past it the Atlantic Ocean. The beautiful, crystal-blue bathwater of the Mediterranean differed from the rugged, white-frothed Atlantic, which helped carve the mountains and windswept the people of Wales. The national anthem refers to the sea acting as a wall for its pure land: 'tra môr yn fur i'r bur hoff bau'. That small piece of settled land that became known as Wales – hugged between the mountain and

the sea – became a place of refuge and of hardship as its people clung deeper and more stubbornly to land and rock.

The result is a country where the horizontal spread of power was difficult in the face of vertical barriers. As Braudel (1996, p. 32) stated, ‘the mountains as a rule are a world apart from civilizations which are an urban and lowland achievement. Their history is to have none, to remain always on the fringes of the great waves of civilization.’ The mountains structured human settlement and the patterns of landholding. The upland and lowland divide was a social and material fact. Pastoralism and transhumance were to be found in the highlands, while cultivators were busy on the arable land of the lowlands. The pattern of *hafod* and *hendre*, of a summer upland pasture and a winter valley settlement endured from the depths of time, reproducing a cyclical economy that was intimately tied to the environmental rhythms of Wales.

The Roman imperial machine found rich resource in the geology of Wales, extracting gold at Dolaucothi and lead in Ceredigion. Yet not even the Romans could sustain a large level of urbanism or intensive grain production. The road system followed the lowland areas of the east and south but petered out in the west and north because of its cost and inefficiency. Economic surplus would remain shallow.

The political authority of Wales remained just as fragmented. Power rested in river valleys and trade corridors, and it was in these regions that the Normans made their presence felt. Castles were sited according to geographic choke points: Rhuddlan on the Clwyd, Caernarfon on the Menai and Chepstow on the Wye. In the medieval era, the law of Wales persisted in the upland Welshries, while the Englishries and their law was to be found in the lowland towns. This was a spatial expression of the conflict that existed between two existing ideas of Wales.

While much of Wales was agriculturally marginal, its geological substratum contained vast resources of extractive value. Lead, coal, iron, slate and copper were all to be found under its surface. The eventual transformation of Wales into an industrial nation

was prefigured by this resource geography, but it did not manifest structurally until the eighteenth and nineteenth centuries. These minerals lay locked beneath mountains and moorland, useless until capital, labour and infrastructure arrived to exploit them.

Geography would structure the cultural life of Wales. The survival of the Welsh language, its relative strength in certain areas and decline in others, has long been shaped by terrain. Mountainous zones and coastal peninsulas provided spaces of linguistic resistance while the easily accessible borderlands, port towns and industrial hubs facilitated anglicisation. The language frontier of Wales is a cultural phenomenon shaped by spatial reality.

The Anglo-Saxons and post-Roman Wales

*Wales is made by the Welsh people in
circumstances chosen by others.*

Neil Evans

The departure of Roman laws and legions in Britain coincided almost perfectly with the arrival of the Germanic peoples: the Angles, the Saxons and the Jutes. The upland terrain of Wales, which had once frustrated Roman integration, also prevented the easy penetration of the newly emerging Anglo-Saxon kingdoms in southern and eastern Britain. Yet the south and east were not at the centre of Wales's political, cultural and economic imagining. Wales was in the bosom of the Celtic world; it found itself nestled between the Irish to its west, the Manx, Picts and Scots to its north, and the Cornish and Bretons to its south. Via the Irish sea, it remained connected to the Celtic and Christian world. The church was central to the reproduction of Celtic life. Monasteries such as those at St Davids and Bangor became centres of literacy and agrarian organisation, as well as religious authority. St David did not go to the western edges of Wales to get away, but to be at the centre of the Celtic world. In the absence of a centralised state, the church and monasteries served as a unifying force and ideological and administrative centres within the fragmented political landscape.

By the sixth and seventh centuries, the Anglo-Saxon kingdoms of Mercia and Wessex were advancing westward, establishing political dominance across much of lowland Britain. The material and symbolic relationship between the English core and the Welsh periphery was physically etched into the landscape itself. Offa's Dyke represents the earthen vestiges of border management from a time long before ours (Stahnke, 2023). The Dyke was built by the Mercian King Offa in the late eighth century. The name Mercia derives from the Old English word for 'people of the boundary', sharing the same root as March which would later form the basis of Norman and English control in Wales. The Mercians, therefore, were defined by their relationship to Wales. This massive earthwork, which ran approximately 150 miles from coast to coast was an act of political and ecological demarcation. It materialised a frontier, defining a zone of control and a line of separation between two polities and, ultimately, two economic systems. While the frontier allowed Welsh kingdoms to develop to its west, it also institutionalised the fact that the original Britons had now lost access to their most fertile plains. It would have to be here, at the edge of existence, that the Britons would make their living.

Despite this marginalisation and fragmentation, a coherent legal and cultural order that was rooted in custom and oral tradition bound the ideological superstructure of the kingdoms. The laws associated with Hywel Dda codified kinship structures and the social relations that existed between classes. Without a centralised state, custom became the medium through which kingdoms interacted. The obligations of hospitality that existed between regions created a very real social and psychological difference between *y Cymry* and the Anglo-Saxons.

The economic basis of Wales was pastoral with cattle, not coin, being the main source of wealth. While long-distance trade was limited, it did exist within the Celtic world. Salt and wine from Ireland and Brittany would sporadically make its way to Wales. The rugged interior meant that trade routes would continue to be littoral, following the old coastal shipping paths. Within agriculture,

grain was cultivated in the lowland basins while cattle pasturing was prevalent in the uplands. This was a society of seasonal transhumance. The almost impossibility of extracting a surplus from the land meant that labour was social and not commodified and the vast majority of production was for consumption.

The Normans and the Welsh March

Poor Wales. So far from heaven, so close to England.

Sharon Penman

The Norman conquest of England in 1066 initiated a transformation of power across the British Isles. But while England was rapidly consolidated under a feudal monarchy, Wales presented a different set of structural challenges. Its fragmented terrain, weak surplus base and decentralised political formations frustrated direct incorporation. What emerged instead was a distinctive colonial formation: the March of Wales. The March embodied a hybrid system of governance, rooted in the interplay of Norman expansionism, Welsh resistance and the geography of a marginal terrain.

The initial Norman incursions into Wales were partial. Unlike the rapid consolidation seen in England, the conquest of Wales unfolded in phases over more than a century. Early campaigns focused on securing the lowland and border regions like Gwent, Glamorgan and the Dee valley. These zones were quickly carved into Marcher lordships: semi-independent territories granted to loyal Norman nobles who were given wide-ranging legal, fiscal and military autonomy.

The English crown lacked the logistical and military capacity to project power deep into the Welsh interior. Therefore, it relied on a delegated sovereignty where Marcher lords were incentivised to extract tribute and construct castles in return for governmental rights. These lords were quasi-sovereign rulers within their own domains. Marcher lords developed a distinctive political economy designed to

maximise surplus from a limited and geographically uneven base. In fertile lowland areas, they introduced manorial systems, cleared woodland and imposed feudal tenures. English settlers were brought in to establish boroughs. These settlements served as administrative and commercial nodes that linked the March to English economic circuits.

In upland areas, where arable agriculture was impractical, Marcher lords extracted tribute in the form of cattle, wool or labour services from the Welsh peasantry. They often preserved Welsh customary law for native tenants while applying English common law to settlers. This dual legal system reinforced ethnic divisions and ensured elite dominance over both populations. The legal regime of the March was structurally distinct from either England or native Wales. Marcher lords were granted the rights to raise armies, hold courts, levy taxes and even mint coinage in their own territories due to the Norman need for flexibility in a frontier society. Apart from the church's land, the Marcher lord was the universal landlord, and it was an area in which the king's writ did not run (Davies, 1979, p. 41).

Central to the making of the March was the castle, which acted as an instrument of spatial control. They were usually sited at strategic locations along trade routes or river crossings. They were a physical manifestation of the imposition of foreign control on the Welsh. By 1100, a dense network of motte-and-bailey and stone castles stretched across the eastern and southern fringes of Wales. Around these castles grew planned settlements and market towns. Colonists from England, Normandy and Flanders settled here with privileges and legal protections. The castles were central to reproducing a settler colonial society and a dualistic legal structure.

Yet much of western, central and north-western Wales remained under native rule. They were defended by kin networks and the terrain itself, and favoured a guerilla form of warfare due to their more intimate knowledge of the landscape. Gwynedd, Powys and Deheubarth remained under the control of native dynasties. They adapted, building their own castles and patronising their own monastic institutions. But their capacity for centralisation was limited by the

same geographic features which made Norman incursion difficult. Only for a very brief period from 1057 to 1063 when Gruffudd ap Llywelyn reigned over Wales was this fragmentation broken, 'a feat with neither precedent nor successor' (Davies, 2007, p. 100).

Wales would remain impoverished compared to England, as illuminated by the *Taxatio Ecclesiastica* of 1290, issued by Pope Nicholas IV. From the ecclesiastical wealth compiled in Welsh, English, Irish and Scottish parishes, it emerged that the wealth of the English church was three times greater than the total for Wales, Scotland and Ireland combined. Furthermore, the diocese of Glasgow alone was worth more than the entire ecclesiastical province of Wales (Campbell, 2008).

The Marches have shaped Welsh history to this day; it continues to be divided along the old borders. They continue to define the cultural-linguistic frontier of the (generally) Welsh-speaking west and north and the more linguistically anglicised east and south. The dragon's spiked back protrudes out of the landscape, running its way down the spine of Wales, from Eryri in the north, through the Cambrian mountains and to Bannau Brycheiniog in the south, acting as a buffer across the bony face of Wales. In the words of Gwyn A. Williams (1985, p. 62):

In one sense, it has been a frontier between two different human communities, as one people, split by a political demarcation line, developed into two divergent societies operating to different historical chronologies, with different laws and different loyalties, threatening sometimes to become two embryonic 'nations'. Human beings, wrenched apart into divergent historical experiences, interiorized those experiences and those divergences as custom, memory, and tradition.

Geographic conditions and the economy

In an age where agriculture was intimately tied to not only subsistence but also trade, the very land on which the people lived

had a profound effect on the forms of accumulation possible. Large swathes of Wales and Scotland reside on mountains: the roofs of our earth. Much of Wales was unsuited to the growing of wheat due to its heavy rainfall and geology, which meant that animal husbandry via the rearing of cattle (and later sheep) was the main native industry. People lived a semi-nomadic existence, moving to uplands in the summer with their herds. This affected the ability of towns and villages to form, as they tended to develop in places where wheat was more extensively grown. As a result, the population of Wales did not exceed a quarter of a million before 1500. It was sparsely populated and its inhabitants were fairly evenly distributed, as there were no large towns.

In the fourteenth century, the number of English settlements dwarfed that of the Celtic countries. Due to the natural endowments enjoyed by England in agricultural resources in an agricultural age, one would expect to see some discrepancy in the number of large settlements. However, the trend was to also create English settlements along the border of Wales such as the market towns of Hereford, Bristol, Shrewsbury and Chester. Trade routes ran west to east, rather than north to south. Wales did not possess an internally coherent economy but was instead subdivided into three areas which had their cores in England. The north Wales coast was centred on Chester, mid Wales on Shrewsbury and the south on Bristol (Bowen, 2022).

Wales became by far the most important source of cattle for both Shropshire and Herefordshire (Edwards, 1981). The location of these trading towns on the English side of the border meant that Welsh commodities were used for English development. Wales had no independent economic control and was reliant on English towns. Welsh internal trade was inhibited by the location of English border towns and its internal economy remained fragmented and incomplete.

Llywelyn, Edward and the Making of a Conquered Wales

*Here at the edge of night
They slew Llywelyn.
Never shall we forget.*

*The stream that I see here
Llywelyn saw.
He stepped upon this stone.*

*Here at the edge of night
The enemy drew near
Unseen. All happened here.*

*Here where I am now
Blood-bespattered grass
Cradled his head once.*

*Here is our memory.
Here, the air we breathe.
Here, just now, our birth.*

Gerallt Lloyd Owen

In the century after the Norman conquest of England, Wales remained both vulnerable and resistant. The lowland edges of the country had been carved into Marcher lordships, castles had been planted along river crossings and trade routes, and English, Norman and Flemish settlers had begun to form privileged borough communities in the south and east. Yet much of Wales remained beyond direct English rule. Gwynedd, in particular, retained a political weight that the Marcher lords could not destroy. Gwynedd was the region in which Welsh political power came closest to

overcoming the fragmentation that had long defined the country. If a Welsh political core was to develop, it would be here.

By the middle decades of the thirteenth century, Llywelyn ap Gruffudd had transformed Gwynedd into the centre of a wider Welsh political project. The title he eventually secured, *Princeps Walliae*, expressed the ambition of his project. It was an attempt to give institutional form to a country whose geography, kinship structures and shallow surplus base had historically made centralisation difficult. Wales had known moments of wider unity before, most famously under Gruffudd ap Llywelyn in the eleventh century, but these had been brief. Llywelyn came closer than any later medieval ruler to creating a durable Welsh polity before its conquest by the English crown.

His power rested on the edge of a precipice. Welsh law continued to follow that of partible inheritance, called *cyfran*, a form of gavelkind as existed in Ireland. Fratricide – or at least the imprisonment of brothers – became a common theme in Wales, as estates and titles were shared between sons after the death of a father. This meant that each new generation had to fight to remake itself. This reality, while clearly fairer than primogeniture which had been imported to England from Normandy, meant that Welsh kingdoms existed in a consistently existential position. Llywelyn had to use the political traditions of Welsh kingship while operating in a British Isles increasingly shaped by feudal monarchy and expanding state capacity. In this sense, Llywelyn stood at the meeting point of two political worlds. His rule represented the high point of native Welsh state formation whilst also revealing the constraints under which that state formation occurred.

Despite this fact, Henry III acknowledged Llywelyn as Prince of Wales in the Treaty of Montgomery in 1267, giving diplomatic sanction to that which Llywelyn had created through sheer force of will. However, this recognition was always unstable. The title existed within a hierarchy of overlordship in which the English king claimed superiority. When Edward I came to the throne in 1272, this instability came to the fore. Edward I inherited a larger, richer kingdom with

a more developed apparatus of rule. The first war between Edward and Llywelyn in 1277 exposed these structural differences. Edward was able to mobilise armies, fleets and supplies on a scale that placed Gwynedd under enormous pressure. His strategy was to break the material basis of Llywelyn's power by controlling the coast, seizing grain-producing zones, and by encircling Gwynedd and thereby weakening its capacity to reproduce itself politically and militarily. Llywelyn survived this loss, but the Treaty of Aberconwy reduced his authority and stripped away much of the wider settlement achieved at Montgomery. His power was forced back towards Gwynedd.

The final crisis came in 1282. The rebellion that began that year reflected a wider crisis in the relationship between Welsh society and the expanding English state. Edwardian officials, legal interventions, castle-building, taxation and administrative pressure generated resentment among Welsh rulers and communities alike. The rising of 1282 was a response to the extension of a foreign apparatus of rule into Welsh life.

Llywelyn's death near Cilmeri in December 1282 marked the collapse of this political project, and the embers of an independent Wales were extinguished. Dafydd ap Gruffudd continued resistance for a time, but his capture and execution in 1283 brought the native principality to an end. The brutality of Dafydd's punishment was a statement about sovereignty. He was hung, drawn, and quartered. The English crown was making a claim that it was treasonous to declare an independent Welsh power in Edward's new political order. The Statute of Rhuddlan of 1284 gave institutional form to this victory. It reorganised the conquered lands of the princes into shires and placed them under royal officials. English criminal law was introduced, while some elements of Welsh civil law were retained in modified form (Pryce, 1993; Davies, 2000; Given, 1990).

Rhuddlan took territories that had belonged to native princes and made them administratively intelligible to the English state. The shire, the sheriff, the royal court and the written procedures of English governance were instruments through which Wales could be ruled, taxed and disciplined. The Welsh were not to become equal

to the English, but they were to become governable as a conquered people. The law became the superstructure above the political economy of conquest.

English law altered the terrain of class relations. It increased the ability of lords, officials and ecclesiastical landowners to define land as an object of revenue. It strengthened forms of tenure more compatible with feudal extraction and weakened those aspects of Welsh custom that tied land to kinship-based reproduction such as *tir cyfrif* and *tir gwelyog*. The English boroughs were central to this new order. In the planted towns, English settlers enjoyed privileges denied to the Welsh population around them. These boroughs were class and ethnic institutions, concentrating trade, administration and legal privilege in the hands of communities tied to the conquering power. Around castles such as Caernarfon, Conwy, Harlech and Rhuddlan, the borough created a protected space for merchants, craftsmen, officials and settlers whose economic life was connected to English rule (Soulsby, 1983; Taylor, 1986; Stevens, 2010). The castle and borough reinforced each other whereby one held territory militarily, while the other reorganised it socially and commercially.

The result was a dual society. Welsh peasants and tenants remained tied to rural production, customary dues and the burdens of conquest, while privileged borough communities mediated trade and administration. This was a colonial-feudal order in which ethnic distinction, legal inequality and class extraction reinforced one another. The Welsh, in their way, had been poor because the land was poor. Now, they were made poorer by their subordinate position within a new structure of rule. Their access to office, trade, urban privilege and legal protection was restricted. Their labour and rents sustained an order from which they were largely excluded.

The castles of Edward I were the clearest material expression of this structure. They were monumental and deliberately placed. Their construction required labour, stone, timber, money and administrative coordination. They were built from the surplus-commanding capacity of the English crown and then used to secure further surplus from the conquered territory. The castles

were a physical expression announcing the arrival of a state which was capable of fixing domination into the landscape (Taylor, 1986). Conquered territories were expected to contribute to the maintenance of their own subordination. Rents, fines, tolls, market dues and taxation became part of the everyday experience of conquest.

The wool economy should be understood within this framework. The export of wool from Wales was part of the commercial political economy of medieval Europe. Welsh uplands, already suited to pastoral production, became increasingly valuable to landlords and monasteries able to organise large flocks. The Cistercian monasteries, such as those at Tintern Abbey in the Wye Valley and Strata Florida in Ceredigion, established vast commercialised flocks whose wool was destined for the lucrative international markets in Flanders and later for the growing English cloth industry centred on East Anglia and then the West Country (D. H. Williams, 1985). These monasteries operated as market-orientated landowners on a large scale for a single export commodity.

The growth of pastoral production also placed pressure on customary land use. The uplands had long supported seasonal movement, grazing rights and mixed subsistence. As wool became more commercially valuable, pasture became more attractive to lords and monastic estates. The consolidation of land for flocks restricted older rights of access and intensified the dependence of tenants on lordly power.

The Marcher lordships remained important within this order. Edward's conquest did not dissolve them. It created a divided Wales in which the conquered principality was brought under royal administration while the March continued to operate through its own liberties. The result was a continued yet differentiated jurisdictional fragmentation. Wales contained royal shires, Marcher lordships, planted boroughs, monastic estates and Welsh rural communities governed through varying mixtures of custom and imposed law.

Resistance followed from this structure. The revolt of Madog ap Llywelyn in 1294–5 emerged from the pressures of taxation,

military obligation, legal subordination and administrative intrusion. The later rebellion of Owain Glyndŵr drew upon similar but more developed grievances: exclusion from office, conflict with Marcher power, resentment of English legal dominance and the memory of Welsh sovereignty (Davies, 1995; Davies, 2000). These risings expressed the contradiction of a society governed by institutions that extracted from it while denying it equal participation.

The conquest of Wales was the defeat of one possible path of state formation and the imposition of another. Llywelyn ap Gruffudd's principality had attempted to create a Welsh political centre from the materials available to it. Edward's conquest destroyed that centre and replaced it with a structure that tied Welsh land, law and labour more closely to the English crown.

The Tudors and state consolidation

The Wars of the Roses arose from a profound monarchical crisis. This developed from a contested succession, weak royal authority and intense noble rivalries. Henry VI's reign was central to the emerging crisis. The instability which came from his mental illness and inability to govern effectively led to a power vacuum that rival factions sought to fill. The House of York led by Richard III pressed their claim to the throne, arguing that their bloodline provided a superior hereditary right compared to the Lancastrian line established by Henry IV. However, medieval succession laws lacked clarity, especially when a monarch was incapacitated, leaving questions of legitimacy open to dispute. This uncertainty fuelled factionalism among England's powerful nobility, who maintained private armies and often switched allegiances to secure their own interests. The country had also been weakened economically and socially by the costly Hundred Years' War and internal unrest, including the Peasants' Revolt of 1381, leaving the crown financially strained and politically vulnerable.

Open conflict erupted in 1455 at the Battle of St Albans, inaugurating a brutal series of civil wars marked by pivotal battles at

Towton, Tewkesbury and Bosworth Field. It was at Bosworth Field that Henry Tudor, a relatively minor claimant with Lancastrian ties, decisively defeated Richard III, ending the Wars of the Roses and initiating the Tudor dynasty as Henry VII. Henry's claim to the throne was tenuous: he was the great-great-grandson of John of Gaunt and his mistress (and later legitimised wife) Katherine Swynford. His accession was significant not only for ending decades of dynastic warfare but also for his skilful consolidation of royal authority.

Henry VII faced the monumental task of restoring stability to a fractured kingdom. He achieved this through a combination of strategic marriages and careful political manoeuvring to neutralise potential rivals. Unlike his predecessors, Henry VII strengthened the financial foundations of the crown, improving taxation and royal revenues to reduce dependence on magnates. He also worked with Parliament to enact legal reforms that reinforced royal prerogative, diminished the military power of the aristocracy, and established the Tudor state as a more centralised and bureaucratic entity. Through these efforts, Henry VII transformed a monarchy weakened by civil war into the foundation of an early modern state, securing peace and ushering in a new era of political stability in England.

The Tudor period was characterised by the transition from medieval to modern statehood, where the increasing complexity of trade, social structures and the economic base required increasingly complex and modernised state structures (Jones, 2004). The early modern European state was more intensive than its medieval predecessors and included the incorporation of territories to create a more defined whole: the first steps towards creating a unitary state (Gustafsson, 1998).

Technological change helped spur the urge for territorial unity and uniformity. The fifteenth century saw the invention of the printing press. Medieval Britain had been a place where power and laws were communicated orally. Laws were localised and customary, and by extension varied across space. Changes

in productive technology changed the legal superstructure that it rested on. This change expressed itself in the development of a new state strata whose role it was to administer, implement and explain the law: bureaucrats. The rise of a bureaucratic culture meant that territorial and administrative unity were seen as two parts of the same coin.

The process of unifying Wales and England under the Tudors was part of a wider process that attempted to standardise state structures across the island of Britain. These efforts were based around strengthening control over the borderlands of the English state. It included the Acts of Union between England and Wales between 1536 and 1542 and the stripping of the courts of Chester, Lancaster and Durham of much of their power. The power of the Council of the North was also curtailed, before being disbanded in 1641. The sixteenth century saw the south of England achieve dominance over Wales and the north and west of England. The crown defeated the Pilgrimage of Grace in 1536, the Cornishmen's Revolt in 1549 and the Rising of the Northern Earls in 1569. These events brought these areas under the ambit of the crown and the south.

This followed developmental processes that were taking place across Europe. Castile and Aragón unified in 1469, while the Treaty of Vannes in 1532 brought Brittany under the tutelage of the French state. The process of balancing on the Italian peninsula meant that the same process did not take place there. England's world-system position affected its rationale for state consolidation. The English state was a power of secondary importance compared to the continental powers. England was a country on the near fringes of the European world in economic, cultural and geographical terms, acting mainly as a wool exporter for continental manufactures. The dominant economies were in the Mediterranean lands, especially in Italy; in south Germany; in the commercial and industrial cities of Flanders; and the north German towns of the commercial empire of the Hanseatic League (Coleman, 1977, p. 49). It simply could not effectively wage wars against the Spanish and French crowns;

the state therefore reoriented its gaze westwards and northwards to the peripheries of the British archipelago as a way of consolidating power and improving its position within the world-system.

At the beginning of the modern period, the fact that they had been sent packing [in the Hundred Years' War], made the English set more store by domestic tasks: the improvement of land, the reclamation of forest, marsh and heath. They began to pay more attention to the dangerous Scottish border, to the threatening presence of Ireland, and to the anxieties occasioned by Wales. In short, what England had derived from her apparent defeat was a reduction of her territory to modest proportions, which would later prove much more amenable to the rapid formation of a national market. At the same time, the break with the continent was paralleled in 1529–33 by a break with Rome, which set an even greater distance between England and the rest of the world. (Braudel, 1992b, p. 354)

The Acts of Union with Wales

*Fair Harry, our long lasting joy,
The one who set us free,
Good was it for Wales all his life,
That the man of Gwynedd was crowned*
Siôn Tudur

The Acts of Union between England and Wales determined the course of history of Wales and began a process which brought Britain under the tutelage of the central government in London (Williams, 1950, p. 33). These developments began with the accession of Henry Tudor to the throne. In Wales, it was his mythical ancestry that led to his support among the people. His family claimed descent from Cadwaladr ap Cadwallon, king of Gwynedd in the seventh century, popularised by Geoffrey of Monmouth as the last king of the Britons. Cadwaladr's standard was that of the red dragon, which now adorns the Welsh flag. His

Welshness played no small part in the fact that he decided to land in Milford Haven and why he was successful in rallying Welsh support for his cause at Welshpool. This help was one of the key reasons for his victory at the Battle of Bosworth (Kearney, 2012).

Henry used the Welsh myth which shrouded him and his family. He carried the standard of Cadwaladr into battle alongside that of St George and named his first son Arthur after the fabled king who defended Britain against Saxon invaders (G. A. Williams, 1985, p. 124). Henry improved the position of the Welsh by appointing Welshmen to key offices, such as to the Sees of St David and St Asaph, and by repealing the penal laws against Welshmen holding office and acquiring land.

All these things taken together, Henry's enthusiastic adopting of Welsh heraldry and names, his curiosity of his lineage, his penchant for the tastes and sounds of his youth, and willingness to employ and befriend Welsh faces strongly suggest a king who embraced his Welsh heritage and felt a deep affinity for his compatriots. (Amin, 2024, p. 332)

Henry Tudor therefore began the process of changing the legal and social position of Wales, moving away from its position as a colony to something resembling parity, at least in form if not in content. The work begun by Henry VII of bringing Wales fully under the tutelage of the English state and improving the position of the Welsh within it was completed by his son, Henry VIII. The Acts of Union dissolved the Marcher lordships and created a uniform administrative geography of shires. It introduced unity to Wales and created a united polity, far different from the customary laws of the Marches. The original purpose of the Marcher lords was to quell dissent from the Welsh, but with the expansion of the capabilities of the state they had become superfluous. Rather than suppress protest, the Marcher lords now became possible separated spheres of influence and power that challenged the crown. In essence, they had outlasted their usefulness.

The Acts led to the enforcement of English common law throughout Wales. The Marcher officials whose verdicts tended to be ad hoc and based on oral law were replaced by the sheriff and Justices of the Peace. Wales now reflected England. While the Justices' main duty was to maintain law and order by applying the legal code, they also had an administrative function such as the collection of taxes.

The Acts of Union positively moved the relationship between the people of Wales and the crown to one of relative equality before the law. The Welsh were now equal to the English and enjoyed the same privileges that they did. They could send representatives to Parliament, and receive the full rights as subjects. This very importantly meant that they could participate in the economic life of the towns.

The Acts of Union meant that all regions of Wales ceased to be independent. Yet, a singular Welsh state did not exist before the Acts either. The Acts meant that the border between Wales and England was drawn and delineated for the first time. Wales therefore moved from being a geographical expression to a material reality. It was transformed from being an undefined, abstract corner of the British Isles to a place that included the rule of law, legal boundaries and a well-defined territory. The Acts in effect gave Wales a 'corporate identity' for the first time (Bowen, 2022, p. 9).

The Acts of Union also influenced the Welsh language. While the rationale stemmed from creating a rationalised legal, political and economic structure, the Acts curbed Welsh-language provision in the courts. The Statute of Wales of 1536 stated:

Sessions courts, hundred-leetes, sheriffs' courts and all other courts shall be proclaimed and kept in the English tongue, and all oaths of officers, juries and inquests and all other affidavits, verdicts and wagers of law shall be given and done in the English tongue, and that henceforth no person or persons that use the Welsh speech or language shall have or enjoy any manner of office or fees within this realm of England, Wales or other the King's Dominions, upon pain

of forfeiting the same offices or fees unless, he or they use and exercise the speech or language of English. (HC Deb, 13 October 1942)

Convenience rather than animosity was the driving force behind this decision. Welsh speakers were allowed to take office, receive legal representation in court and to sit on juries. To assume that the framing of the legislation had a deliberate intent to suppress the Welsh language would be to attribute to them the ways of thought of a later age. National consciousness in Europe was still far too indefinite and ill-defined for this to have been possible. There was no clear reduction in the number of Welsh speakers in this period. In truth, the Tudor dynasty assisted in the survival of the Welsh language via the printing of the Bible into Welsh in 1588. Their legislation may seem idiosyncratic to modern eyes, but within the process of state rationalisation and modernisation, Tudor policy was sensible and relatively enlightened.

Rather than sounding the death knell of Wales, the Acts of Union enacted by the Tudors were, for the period, a progressive development in Welsh life. The Acts meant that ‘Wales had undergone the passage from the late medieval to the early modern world’ (Wilks, 2021, p. 7). The progressivism shown towards Wales was no doubt helped by their Welsh ancestry. However, it is important to put this period into its wider historical environment. The Acts of Union can only be considered progressive in the context of the three or so centuries of destitution that preceded them. Compared to the dualistic legal code which made the Welsh second-class citizens in their own country, meaning that they could not take part fully and freely in economic life, the Acts of Union and the reign of Henry Tudor as the first modern English king must have felt revelatory. However, this new legal code did not garner the support an indigenous system would have gained. The average Welsh person, still monoglot, would not have been able to understand the law.

Economically, the indivisibility of Wales and England led to fewer positive consequences. The Acts of Union were not mutually

agreed upon by the English crown and the Welsh. This one-sided incorporation affected Wales's ability to develop its own economic and political identity. Welsh institutions and Welsh law were disbanded, making London the political and economic centre for Wales. While the Acts fostered a growth in trade between England and Wales, which abstractly benefitted the Welsh, it also meant that the Welsh economy aligned with the rhythms of its larger neighbour. Wales's legal integration into England led to the specialisation of Wales as a cattle area, largely with English landlords (Wallerstein, 1972). The Acts transformed Wales from a geographical entity into a defined political unit, yet the institutional aspects of nationhood that differentiated Wales from England were eroded. It would not be until the twentieth century that some of these institutions were (re)introduced.

The Reformation

Within this same milieu, the English Reformation and the dissolution of the monasteries between 1536 and 1541 were being conducted. The Reformation led to a vast change in land ownership whereby old ecclesiastical land was sold, with the profit accruing to the king. This increased the productive capacity of the state to not only wage war against other kingdoms, but the consequent rise in administrative needs and tasks led to the rationalisation and growth of a central state bureaucracy. Moreover, the dissolution of the monasteries helped pave the way for the growth of capitalist social relations within England. The church was one of the most ardent defenders of feudal property and social relations, with long copyhold tenures and a self-sufficiency which provided little incentive for capital investment or productivity increases (Swanson, 1989). The dissolution helped shift the form of tenure away from the copyhold system towards those of leasehold and freehold, and in so doing, changed land to a commodity to be bought and sold. The value of land and rent was now linked to productivity, which on

the one hand created a class of rich, commercially oriented farmers called yeomen and, on the other, the growth of landless labourers.¹

The birth of capitalism

For, indeed, a change was coming upon the world, the meaning and direction of which even still is hidden from us, a change from era to era. The paths trodden by the footsteps of ages were broken up; old things were passing away, and the faith and the life of ten centuries were dissolving like a dream. Chivalry was dying; the abbey and the castle were soon together to crumble into ruins; and all the forms, desires, beliefs, convictions of the old world were passing away, never to return. A new continent had risen up beyond the western sea. The floor of heaven, inlaid with stars, had sunk back into an infinite abyss of immeasurable space; and the firm earth itself, unfixed from its foundations, was seen to be but a small atom in the awful vastness of the universe. In the fabric of habit in which they had so laboriously built for themselves, mankind were to remain no longer.

James Froude

The aristocratic class in England was a landholding class. Europe existed in an agricultural state where ‘land was the sole source of subsistence and the sole condition of wealth’ (Pirenne, 2014 [1937], p. 7). All classes lived directly or indirectly from the fruits of the earth. The aristocracy parcelled their estates and rented strips of land to the peasantry as tenants, usually over a period of three generations. These peasants would grow their own food and produce much of their everyday goods. They would sell or trade any surplus they might have at the local market. The relationship

1 A good definition of yeomen can be found in Underdown (1985, p. 24): ‘A yeoman was usually a substantial farmer concentrating primarily on the market rather than on subsistence agriculture ... Their increasing acceptance of the ethos of the market justified the pursuit of individual profit, sometimes at the expense of the traditional ideal of the co-operative community. Yeomen were the villagers most able to take advantage of a lord’s sale of demesne lands, profit from piecemeal enclosure by agreement, or buy out poorer neighbours driven to the wall by a run of bad harvests.’

between lord and peasant was regulated by custom, with the rights and obligations of each man rigidly defined. Within this system, the lord would take what was owed to him via extra-economic means. The lord of the manor would rely on extracting surplus in the form of rents, tax, coercion or force via his position as lord rather than by relying on the market. To this end, if a lord wished to raise their income, rather than raising the productive efficiency of their land, they would improve their means of coercion by investing in their private militia (Brenner, 1986). In pre-capitalist society, peasants had access to their means of subsistence and reproduction: the land. Because the peasant family retained possession of its subsistence holding, the transfer of surplus had to be compelled. The peasant did not need to alienate his labour power in order to live (Hilton, 1976, p. 15).

Capitalism is different. Under capitalism, surplus is appropriated through economic means, and direct producers are dispossessed of independent access to the means of production. Producers gain access to the means of subsistence through the sale of their labour power in exchange for a wage. Capitalists can then appropriate surplus without direct coercion (Wood, 2002, p. 96). The necessities of life become commodified. The production of things moves from being organised primarily around use-value, such as clothes to wear or food to eat, to a system in which exchange-value becomes dominant. Production therefore becomes an imperative in and of itself.

Agricultural capitalism and its foundations

By the sixteenth century, England was a particularly centralised and unified state under an absolutist monarchy. On the continent, sovereignty tended to be more parcellated, with lords still holding extensive power within their own spheres of influence. The Tudors, on the other hand, had withdrawn the power of the Marches and the northern lords, leading to a more codified legal system.

This led to the demilitarisation of the English ruling class as they came more and more to rely on the English crown for their

protection and their property rights. This class lost its extra-economic mechanisms for extracting surplus value and was therefore compelled to rely increasingly on economic forms of appropriation. As a result, a new economic logic was introduced into the English countryside. The aristocratic class was forced to transform the manner in which it extracted surplus value. Landlords now had an incentive to encourage tenants to find ways of increasing labour productivity. Rents became linked with market conditions, which meant that producers became market-dependent in their access to land. Those producers with the best labour productivity could afford to rent more land, and the landlords were encouraged to remove unproductive farmers (Byres, 2009). This resulted in a large upswing in the rent-to-wage ratio, with rent increasing 8-fold between 1510 and 1650.

The introduction of market forces into agriculture meant that unproductive farmers lost their means of subsistence and reproduction as a class. These new imperatives created a new class structure in England: one of large landowners, capitalist tenants and a large growth – for the first time – in a propertyless class. These were wage labourers relying on their ability to sell their labour power. This process created a highly productive agricultural sector which could sustain a large population not engaged in agricultural production. The newly propertyless mass would constitute the new wage-labour force and a domestic market for cheap consumer goods (Wood, 2002). Between the sixteenth and seventeenth century, the proportion of the workforce working in agriculture fell from 66 per cent to 43 per cent, while the number of those working in industry and the service industry grew from 22 per cent to 31 per cent and 12 to 26 per cent respectively (Wallis et al., 2018).

These changes happened in England because of its class structure and its land-labour ratio. Fourteenth-century western Europe was characterised by a relatively high population density which affected the balance of class forces. The existence of a large population meant that there was always a reserve army of labour, affecting the bargaining power of the peasantry relative to the aristocracy

and urban centres. The Black Death changed this reality. Labour became scarce, improving the bargaining power of the peasantry.

Where population density and urbanization remained relatively high, as in western Europe, the peasantry's power was augmented proportionately. If the west's population density was still higher than the east's, after 1348 it was still much lower than it had been. The upshot? The feudal equivalent of the 'reserve army of labor' was effectively dissolved, and the seigneurs now had to bargain with the peasantry much more seriously than ever before. The new balance of class forces in western Europe, therefore, favored the rise of the yeoman farmer and intensive agriculture, although not in all regions, and not always to the same degree. Here, the peasantry's class power precluded the reimposition of serfdom, which in the short run exacerbated the ongoing crises of western Europe's ruling strata. Where population density and urbanization was relatively low, as in eastern Europe and the Americas, extensive agriculture developed on the basis of 'coerced cash-crop labor' (serfdom) or outright slavery. This difference was the result at once of the differential possibilities for 'effective resistance', owing to varying degrees of urbanization and population densities, and of the differential commercial opportunities presented by the relative availability of land. (Moore, 2003b, p. 314)

The balance of ecological and social forces in each part of Europe defined the forms of class struggle available. In some instances, the peasantry won and banished serfdom as in England, while in others the seigneurs won, leading to a second serfdom as in the Baltics and Poland.

The parts and the whole: the world-system and agricultural capitalism

*The discovery of gold and silver in America, the expiration,
enslavement, and entombment in mines of the indigenous population*

of that continent, the beginnings of the conquest and plunder of India, and the conversion of Africa into a preserve for the commercial hunting of blackskins, are all things which characterize the dawn of the era of capitalist production. These idyllic proceedings are the chief moments of primitive accumulation ... The different moments of primitive accumulation can be assigned in particular to Spain, Portugal, Holland, France, and England, in more or less chronological order. These moments are systematically combined at the end of the seventeenth century in England; the combination embraces the colonies, the national debt, the modern tax system, and the system of protection.

Karl Marx

While the conditions in the English countryside were changing, for capitalism to truly take root it had to transform the world-system into a capitalist world-economy. The development of capitalism in England is but one part of the whole. Within the feudal mode of production, class struggle between the peasantry and serfs on one hand and feudal lords on the other could become particularly acute (Brenner, 1982). These revolts reshaped the balance of power in favour of one class or another, but they did not fundamentally alter the economic or social system of feudalism. In the sixteenth century, it was not only the balance of class forces that was changing, but the class structure itself was being modified. Yet, this changing class structure and mode of production in England did not predicate that capitalism would become the dominant mode of production at the level of the world-system.

The developing capitalist mode of production in Europe needed oxygen 'if it was not to succumb to auto-asphyxiation' (Blackburn, 1997, p. 374). This oxygen came from the Americas via slave traffic, plantations and the mining of precious metals. By 1561, 85 per cent of the entire world's production of silver came from the Americas, with 180 tons of gold and 17,000 tons of silver reaching Europe by 1640. This bullion jumpstarted the system by creating a large source of money capital for trade with the East and

enabling Europe to monopolise and subordinate their economies (Anievas and Nisancioglu, 2013).

Capitalism and slavery

While selling nominally free labour power in the market is a defining feature of capitalism, capital will always follow the path of least resistance. 'In the peripheral formations, it will be seen that the dominant capitalist mode subdues and transforms the others: it disfigures them, deprives them of their functionality and subjects them to its own, without however radically disintegrating and destroying them' (Amin, 1974a, p. 72). Capitalism will therefore use unfree labour power where possible. The capitalist world-economy relies on differentiation in the forms and functions of different regions. As Marx (2021 [1847]) stated:

Direct slavery is just as much the pivot of bourgeois industry as machinery, credits, etc. Without slavery you have no cotton; without cotton you have no modern industry. It is slavery that gave the colonies their value; it is the colonies that created world trade, and it is world trade that is the precondition of large-scale industry.

Slave labour was essential to capitalist development. Capitalism came into the world dripping from head to foot, from every pore, with blood and dirt. It assisted in supplying key resources to the industrial process and generated the markets necessary for capitalist growth. Trade with the colonies became central to the economic development of the British archipelago, and the wealth of London, Liverpool, Glasgow and Bristol was linked to immiseration.

Slave labour in the West Indies supplied sugar and tobacco on a scale unseen, dislodging the antiquated forms of cultivation in Spanish and Portuguese America. The northern American colonies provided farms, forests, food and fish. Bullion helped transform London into the financial banking place of Europe. The colonies

imported iron chains, nails and woollen clothing for their slaves, which were all produced in the metropole (Williams, 1944, p. 52). The most dynamic parts of the economy in England were predicated on the demands of the colonies (Thomas, 1993, p. 38). Merchants were able to pay good money for the purchasing and transporting of slaves precisely because of the money demand engendered by the slave trade. An emerging middle class had the purchasing power to command exotic commodities, which in turn changed these commodities into products of everyday consumption.

The absence of agricultural capitalism in Wales

Wales was of course part of the new world-system that emerged in the wake of the discoveries of 1492 but it had a differentiated role to England within it. The capitalist imperative did not germinate in Wales. Wales's social structure differed from that of England, emerging from the peculiar material base of Welsh society. The geographic conditions of Wales were less benevolent than England's and its ecology was not conducive to large farming units (Howell, 2016). While large farming units and estates were therefore favoured in England, these same impulses did not bear on Welsh society. The mountainous lands and poor soil of the Welsh highlands meant that animal husbandry, rather than tillage, was favoured by the Welsh peasantry. This semi-nomadic life rested on the commons and its pastures, inhibiting the profit motive for both the peasants themselves and the urge of the landed gentry to hold relatively unprofitable land. The value of land in Wales was lower than in every part of England between 1480 and 1830 (Clark, 2002).

This almost timeless agricultural situation also affected the customary laws in Wales which inhibited the capitalist profit motive. In England, primogeniture had become the preferred mode of inheritance since the Norman invasion (Faith, 1966; Buck, 1990). It ensured that the family's power was maintained more easily, as parcellation could lead to a loss of power relative to other households and families and the good arable land available in England lent itself

to these larger estates. Wales on the other hand had a system of partible inheritance known as *cyfran*. The material and geographic conditions of Wales led to the inability to farm above subsistence level and thus to the importance of pasture held in common. This created a more communitarian social structure compared to that of England.

Henry VIII introduced his Land Laws between 1529 and 1540 which aimed at introducing primogeniture, and while primogeniture *de jure* applied to Wales, the spirit of *cyfran* was maintained long after its legal abolition. The Welsh adopted the unit system whereby each son would build his own home on his father's land. While primogeniture ended the legal sharing of land between sons, the convention of farming in common continued late into the eighteenth century. Material and social conditions in Wales therefore coalesced differently from those experienced in England. One group of conditions eventually led to the rise of the capitalist imperative, while the other did not.

Although Wales did not move in the same market-oriented direction as England, it was given a specific role within its interworking. Between the sixteenth and eighteenth centuries, agricultural production in the British Isles diverged. The lighter soils of the south and east of England were better suited for grain and cereal cultivation. These crops, in turn, were more profitable than animal husbandry. The heavier soils and the higher ground of Wales and the north of England were less suited to the cultivation of these crops and therefore relied on sheep and the fattening and dairying of cattle. The south-east of England was able to concentrate on grain and cereal production for export and consumption as it could rely on its peripheries for a steady influx of meat and dairy to feed its growing population.

The 'English' Civil War

The form of agricultural capitalism that began to rise in the English countryside gave expression to the form of class warfare that emerged

in seventeenth-century England and Wales, culminating in the Civil War and Glorious Revolution. From the introduction of market forces into the countryside, some segments of the gentry in England and Wales had given up their extra-economic means of coercion and commercialised their relationship with their tenants (Brenner, 1989, p. 302). The gentry had become a social and legal class which included 'economic subdivisions within it' (Hill, 2011). Some continued to extract surplus in the old way, while the modernising gentry envisioned a new state that would defend its interests. What they wanted was a 'cheap state', one that would secure order, uphold the rule of law and protect private property (Brenner, 1982).

The Stuarts did the opposite. They attempted to install an absolutist monarchy of a continental style, exemplified by James and Charles I attempting to raise money by removing the constraints imposed on them by the landed classes in Parliament. From this foundation the 'English' Revolution emerged.² The dominant landed class had split and segments supported both sides. One segment maintained its extra-economic means of extracting surplus value, whereas another segment had moved toward economic means of surplus value extraction. Capitalist society emerges from feudal society and is stamped with its birthmarks. The new capitalist segment of the gentry developed from the womb of feudal society. For a time, they could develop within the structure of that society, 'but a point is eventually reached where its further development requires a change in the form of the state' (Callinicos, 1989). The new state favoured the emerging capitalist forces of society, and the administrative structures which impeded capitalist development, such as the Star Chamber and High Commission, were abolished and the crown became subordinated to propertied men.

The new state that emerged had a simple yet profound unofficial motif: 'strong abroad, weak at home'. This new form of governance was less personal and dynastic, and more 'national' in character. The Tudor and Stuart states were essentially executive institutions

2 Historians such as Christopher Hill (2020) argue that the term 'English Revolution' should be used, rather than 'Civil War'.

of the feudal class. It was not until after the revolution that the state becomes subordinated to the capitalists. ‘The revolution of 1640 replaced the rule of one class by another’ (Hill, 1976, p. 119).

These events meant that by 1700, England and Wales possessed the largest national market in Europe, to which Scotland was added by the union of 1707. This strong internal market helped ignite the tinder of Britain’s Industrial Revolution (Hobsbawm and Wrigley, 1999). By the turn of the eighteenth century, Britain could begin to think and act in the spirit of free trade and leave the toilsome work of national development behind it (von Schmoller, 1895, p. 77). This newly created state led to a huge increase in tax-raising capabilities, and elites showed a vitality for taxation in the name of ‘the nation’ and in the name of establishing global hegemony. The real spending of the post-revolutionary British state rose fifteenfold (Mann, 2012). These conditions gave rise to a period of British hegemony within the world-system; one that would begin with the Industrial Revolution and end with the rise of the United States.

Wales and the ‘English’ Civil War

The Welsh, as a people, were generally in support of the crown and royalist in outlook (Price, 1900; Thomas, 1962; Bowen, 2006). Wales had a ‘remarkably uniform and passionate support for King Charles in 1642, a support which earned it the appellation of the “nursery of the king’s infantry”’ (Bowen, 2006, p. 845). Classical historiography explains this support with reference to the long-held love of the Welsh for the Tudor dynasty due to their lineage and for incorporating the Welsh into the English state. Yet, this remains unconvincing. Why would the veneration for the Tudor dynasty extend to the crown in abstraction? It is better to look for the answer within material reality. The Welsh of all classes felt distrustful of the new strength that Parliament had engendered. The custom and tradition of Royalism could act like ‘the dike that might defend them against the invading capitalist flood from which they were scarcely in a position to profit’ (Moore, 1966, p. 12).

The geographical conditions that affected the rise of capitalist agriculture imprinted the island with different economic and social relations. These differing conditions influenced loyalty and support during the revolution. ‘The contrasts in popular allegiance had a regional basis and were related to local differences in social structure, economic development, and culture’ (Underdown, 1985, p. 4). The royalist north and west of Britain were the areas where feudal relations of production persisted the longest and where ecology was least favourable for agrarian capitalism. They represented ‘the dark corners of the land’ (Hill, 2020). The republican south and east were the most economically advanced and ecologically endowed areas of the island.

Hochberg (1984) showed that by drawing a line between Teesmouth on the north-east coast and Weymouth on the south-west coast, the landmass of England and Wales becomes separated into two ecologically distinct zones. The first represents the highlands which have poor soils and a wet climate which predominate in the north and west. In the south and east, there exist lowlands with richer soils, lower rainfall and warmer summers. The former favoured pastoralism and the latter agrarianism. The areas to the south and east of the Teesmouth-Weymouth line were those that began to move in a capitalist direction during the sixteenth century. This part of the island had undergone an economic transformation, yet an extremely rigid and ordered social structure remained in tension with this new economic reality.

Within feudal society, each person was assigned a ‘natural position’ within its hierarchy. These new economic imperatives broke the old social compact in the south-east. The dark corners of the land, on the other hand defended tradition and the natural order of things. While the ‘majority in Wales favoured a moderate religious line’ (Bowen, 2007, p. 240), this moderation stemmed from the more stable economic base of that society. In the areas that supported royalism, a conception of stability and moderation remained, with the church and crown at its heart. On

the other hand, Puritanism came to represent a new politics of the ‘middling sort’ which was more capitalist in outlook and aligned with Parliament (Hill, 2020). Britain was divided between a core and a periphery, and these regions had different understandings of society. As Wallerstein (2011b, p. 123) argued:

England had its peripheral regions and a fortiori Great Britain. These peripheral regions, located within a core state, were fearful of two trends: the gradual strengthening of the English-British state, which threatened them politically, and the triumph of the capitalist elements, which threatened them economically. In Great Britain, these two threats were coordinate; and it is no surprise that the peripheral areas tended to be more hostile to the English Revolution.

The Industrial Revolution and the ‘Four Cheaps’

As the forces of production advanced, so too demand for Cheap energy, food and raw materials. Cheap thermal energy to smelt the metals, process the sugarcane and make glass, beer, bricks and everything else demanded by the world market. Cheap food to keep the price of labor-power from rising, or at least from rising too fast. And Cheap raw materials – timber for shipbuilding, potash for dyeing textiles, iron for everything – to maintain a virtuous circle of expanding commodity production. In sum, the whole of nature had to be put to work – in a radically alienating and dynamic way – for capitalism to survive.

Jason W. Moore

Capital accumulation depends on four inputs: food, labour, energy and raw materials (Moore, 2015). One must have enough food to feed its populace, enough labour power to create value, the raw materials necessary and the energy needed to transform it. Each social or technological revolution under capitalism has led to the lowering of the production cost of one, if not all, of these inputs in

an attempt to make them ‘cheap’.³ Conversely, each slump within the capitalist system occurs because these inputs are no longer cheap.

The Industrial Revolution saw the simultaneous cheapening of all four of these inputs, which placed Britain as the hegemon of the world-system and solidified capitalism as the primary economic model of that system.

Cheap labour

With the development of agricultural capitalism, peasants began to lose their means of subsistence and reproduction as a class and became proletarianised. Vast swathes of people were forced to move from the countryside to the cities to look for work. For the first time, there existed a reserve army of labour which only had their labour-power to sell. During the long eighteenth century⁴ there was a fourfold increase in the urban population (Stobart, 2000). This migration of labourers from rural areas was exacerbated by the parliamentary enclosures of 1700. Before enclosure, those with common rights could graze their livestock on open fields and on common pastures. This system of open fields – where land was subject to differing use rights – was changed to one of enclosed fields, where the owner or tenant had exclusive rights to that field. With the reduction of the possibilities available for landless labourers, they swelled the towns looking for work in the vast factories and mills. Their labour had become cheap.

The slave trade offered another source of cheap labour and British colonialism moved in a capitalist direction. Slave owners faced market pressures, having to purchase both slaves and land from the market, usually on credit. This prompted them to reduce costs, employ the most productive techniques and gear production

3 These things are not actually ‘cheap’, but capitalism uses them as if they were. Each change in the world-ecological system (such as changing trees to charcoal for energy) influences our web of life. Slaves may be ‘cheap’ in capitalistic terms, but this does not include the human cost paid.

4 Running from the Glorious Revolution of 1688 to the Battle of Waterloo in 1815.

towards the market. When slave prices increased, slave owners sought more productive labour methods, such as Eli Whitney's cotton gin.

This trade directly contributed to the growth of the Welsh economy. 'The connections between Welsh industry and Atlantic slavery were real and substantial in the eighteenth century. Atlantic demand, whether expressed in the slave trade or through the provisioning of the plantation complex, was a direct stimulus to Welsh industrial growth' (Evans, 2015, p. 69). Wales's main industries – slate, copper and iron – were all linked to the slave trade. The slave trader Anthony Bacon invested his slaving profits into the Cyfarthfa ironworks in Merthyr which by 1803 became the largest ironworks in the world. Another slave trader, Thomas Coster, developed the White Rock copper works in Swansea and by 1800 Swansea had become a major metallurgical centre, supplying 90 per cent of Britain's copper requirements (Jenkins and Moore, 2002, p. 396). The copper works of White Rock was linked to the slaver city of Bristol; copper smelting in Swansea rose in tandem with Bristol's slave port. The role of the copper works at Swansea was to produce *manillas*: a form of copper rod that was given to slavers in Africa as payment. These would be sent on ships that left from Bristol (Burnard, 2017). A feedback loop developed within the Welsh economy. Money from the slave trade was used to develop the coal, copper and ironworks which produced products to use in the slave trade. The same pattern existed in Flintshire, where the Greenfield factory's role was to make and finish copper rods for Guinean merchants. Slaves would even have been clothed and garbed in materials woven in Wales. Welsh plains, a simple woollen cloth that was durable, inexpensive and of low quality was bought to clothe slaves. This commodity became colloquially known as 'Negro cloth' due to its usage by slaves (Gwyn, 2020, p. 2).

By the Industrial Revolution, Wales had become entirely absorbed into the world-system. It played a semi-peripheral role between West Africa and England. Its semi-peripherality stemmed from its vulnerability to the needs of England. Wales benefitted from

colonial and imperial developments in England, and it exploited these opportunities; yet it could not chart its own independent economic course.

Cheap energy

England's a perfect world

hath Indies too;

Correct your maps,

Newcastle is Peru.

John Cleveland

The traditional way of creating energy was to burn timber or charcoal, or to use wind and water. For personal consumption, people would cut trees from the commons while large manufacturers would have cut timber from the many ancient forests of Britain. For millennia, this energy would have been 'cheap': forests were abundant, as were the commons, which meant there was no need for technological advancement or a search for a new source of energy. The forest allowed the peasantry to reproduce themselves as a class; it enabled them to warm and house themselves, to build furniture and the tools they needed. This changed in the eighteenth century. The percentage of England's land area covered by woodland was declining rapidly. Wales was not spared from this reduction in woodland as the British iron industry overwhelmed south Wales in its demand for timber.

Due to the increasing shortage of timber at home, Britain began to import it from abroad. Timber cargoes comprised over half of the total shipping tonnage entering British ports (Thomas, 1982). Gross imports continued to rise after the 1750s, with imports of fir timber increasing from 40,000 to 313,000 tons between 1752 and 1792 (Thomas, 1985). Most of this timber was used for naval shipbuilding, meaning that it did not alleviate Britain's energy crisis.

The creation of iron depended on charcoal as an energy source and producing 10,000 tons of iron required roughly 40,000 hectares

of forest (Wrigley, 2017). Without a suitable supply of native timber, iron or charcoal would also have to be imported. This increase in demand drove up international prices, with imported Swedish bar iron rising from £12 per ton in 1763 to £24 per ton in 1795, damaging Britain's terms of trade with its European rivals. The problem for Britain was that energy was no longer 'cheap'. The state was becoming increasingly dependent on outside sources for its supplies of vital resources.

Necessity pushed Britain to seek alternative sources of energy. This necessity was intensified by huge population growth, which led to conflicting priorities for land use. Bread grains, animal pasture, timber for the navy or charcoal for iron all had to fight for supremacy. The solution to this energy crisis came with the substitution of timber and charcoal for coal. Coal had been used before the end of the eighteenth century, but technological innovation allowed it to be used in ways that were now both effective and cost-efficient. Between 1750 and 1850, coal output in Britain increased tenfold.

Coke-fired blast furnaces began to emerge early in the eighteenth century, but it was not until 1784 that Henry Cort overcame the technical problems of using coal to refine pig iron into bar iron with his puddling and rolling process. Coal could now be used in the production of bricks for construction, eliminating the need for timber as a building material. Substituting timber with coal effectively removed the physical output limits imposed by a limited wood supply. Timber needed replenishment and large increases in its consumption could affect future production capabilities. Coal, with its ample supply, did not impose such constraints. Energy had once again become 'cheap'. Simply put, while burning a tree released energy stored from the sun for a century, coal provided energy accumulated over millions of years.

The rise of cheap energy led to a significant expansion in iron output and a reduction in its price. Iron was crucial to the Industrial Revolution. Before the eighteenth century, civilisations were built upon wood and charcoal. It was used for buildings, overland and sea transport, machines and tools, looms and spinning wheels, and

ploughing implements (Braudel, 1992a, p. 362). The precision of working with metal allowed for the invention and replication of the steam engine, propelling the revolution forward on new railway tracks. The improvement of technology also led to an increase in the industrial and agricultural base. This technological revolution helped Britain overcome the geographic constraints of being a relatively small island. Wrigley (1983, p. 138) eloquently explained the outcomes of the transition from an organic economy to one based on fossil fuels:

No matter how assiduously Icarus may strive, human flight is not possible if the energy employed in the attempt is muscular. Yet what will always elude the flapping of artificial wings is readily achieved with the assistance of mechanical power. An organic economy suffers from certain necessary limitations which are ultimately related to physical constraints. An economy which is increasingly based on inorganic raw materials is not so constrained ... The change confers the further advantage that the input of raw materials into the production process, which in an organic economy always creates competition for the use of land, can be achieved from the mouth of a mine rather than from a cultivated field. Between Elizabethan and Victorian times, England [*sic*] moved gradually from dependence upon a purely organic base to a mixed economy in which a steadily increasing fraction of the output of secondary industry was based on minerals. In so doing she also eased herself clear of the problems which would otherwise have led to increasing difficulties.

These changes were to have a monumental effect on Wales. Iron and coal transformed Wales from an impoverished and underdeveloped peasant country to an industrial nation (Wilks, 2021, p. 11). By 1841, 43.3 per cent of people in Wales were employed in heavy industry, manufacturing or in extractive industries. In Glamorgan, this number reached 61.3 per cent. Between 1788 and 1839, iron production increased thirty-sixfold. The population which had remained stable for centuries rose rapidly, mirroring the rise in iron

production. As late as 1801, the population of Wales was roughly 600,000; by 1841, it had surpassed one million.

Cheap food

Between 1550 and 1820, the population of England grew by approximately 280 per cent, while the population of the western European mainland grew by 80 per cent (Wrigley, 2000). In absolute terms, the population of England and Wales was roughly 3 million in 1550, while in France it was approximately 17 million. By the turn of the nineteenth century, the population of England and Wales was roughly 9.3 million and reached 17.7 million by 1851. Improvements in medicinal understanding and the roll-out of inoculation against smallpox meant that, at the start of the long eighteenth century, life expectancy was 32.4 years, and by its end, it was 38.7 years.⁵ Those who managed to survive childhood could expect a relatively long life. But this does not account for how Britain managed to overcome the Malthusian dilemma of exponential population growth on a small island with finite resources.

The turn to fossilised fuels meant that more of Britain's land could be used for bread grains and pastures for livestock. Decreasing demand for timber led to an increase in land available for other uses. This was coupled with the agrarian revolution of the previous century, which had improved the efficiency of the agricultural sector. With the rise of steam and iron, new mechanised equipment further helped to increase crop yields. The need for food brought Wales further under the ambit of England, with the increasing demand of English cities creating a British market for foodstuffs (Hechter, 2017, p. 136). This led to improvements in agriculture, communication and transport, fostering the construction of canals in the eighteenth century and railroads in the nineteenth century, and significantly lowered transport costs for inland trade (G. A. Williams, 1985, p. 177).

5 The world's first vaccine, first used in England in 1796.

The creation of a British market for foodstuffs finally ended the differing agricultural relations of England and Wales. Until the beginning of the nineteenth century, agricultural tenants in Wales maintained a security of tenure that did not exist in England. The leases of tenant holdings in Wales had traditionally been for a period of three lifetimes, lending continuity in social relations as well as economic structure. These long-term rents were fixed, meaning a devaluation for the owner and diminishing rates of return. The inflationary economy at the time of the Napoleonic wars created a need for flexibility in setting rent levels. Consequently, the practice of allocating leases annually, often by auction, emerged. The inflationary effect of the changed leasing practices was considerable, forcing many tenants off the land. The vacated holdings were usually amalgamated into larger units (Adamson, 1991). Inflationary rents and the new agricultural relations in Wales indirectly contributed to the rise of cheap labour, as more Welsh agricultural workers moved to industrial centres for work. Engels (Marx and Engels, 1975, pp. 556–7) analysed the effect of these changing social relations on the Welsh peasantry:

In Wales are to be found, almost exclusively, smallholders, who cannot with like profit sell their products as cheaply as the larger, more favourably situated English farmers, with whom, however, they are obliged to compete. Moreover, in some places the quality of land admits of the raising of livestock only, which is but slightly profitable. Then, too, these Welsh farmers, because of their separate nationality, which they retain perniciously, are much more stationary than the English farmers. But the competition among themselves and with their English neighbours (and the increased mortgages upon their land consequent upon this) has reduced them to such a state that they can scarcely live at all.

Yet no matter the pace of technological development, Britain would not have been able to feed its burgeoning populace on its own resources alone. Industrial Britain had a vast amount of ‘ghost acreage’ which

allowed it to escape the confines of its geography (Jones, 2003; Pomeranz, 2009). The Americas – a source of cheap nature and cheap labour – was also a source of cheap food. Colonial rule and slavery in the ‘New World’ added millions of acres of fertile soil that could be used to feed a growing British population. ‘The solution was ultimately found in two great frontiers, which yielded two great sources of windfall profit. The first frontier was vertical, moving into the Earth to extract coal. The second was horizontal, moving across the Earth to produce wheat, especially in North America’ (Moore, 2010a, p. 394). Britain became the workshop of the world and then exchanged her industrial products for abundant cheap food from new settlements overseas. By 1830, 75 per cent of Britain’s coffee, 93 per cent of its cotton, 95 per cent of its sugar and 97 per cent of its tobacco were produced by slaves in the Americas (Losurdo, 2014). In the world-system, the New World was used to redress the imbalance emerging in the Old World (Thomas, 1982, p. 336).

The national/imperial contradiction

Every civilization is the heir to its own past and must choose between the possessions bequeathed by another generation. Some things must be left behind.

Fernand Braudel

From the nineteenth century, Wales underwent a cultural revival which followed the same pattern of romantic nationalism that was sweeping across Europe. The idealism of movements such as Young Italy led by Joseph Mazzini and the struggle of Hungarian nationalists found receptive ears in Wales. The rise of cultural nationalism and political assertiveness led to the founding of national institutions such as the national library, national museum and national university. This existed alongside a ‘cultural renaissance of Welsh-language literature, education, publishing, and music’ (Jones and Jones, 2003, p. 57). These national symbols began to imbue Welshness with a meaning that could unite the north and the south.

This growing Welshness was steeped in the contradictions of its time: on one hand, there was a growing sense of confidence in Wales's position within the world, accompanied by an increasing understanding of its distinctiveness from England. On the other hand, this was an imperial Welshness that found its place alongside imperial England within the British Empire. Supporting the struggle of Italians and Hungarians against their Austrian neighbours could still fit neatly alongside the 'civilising mission' of the British Empire.

Britishness as a modern political concept began to take shape in the long eighteenth century, characterised by a form of governance that was less personal and dynastic and more national. This process was solidified by the union with Scotland, which created a 'national' state on the island of Britain. The Welsh and Scottish were important elements in shaping this British identity. 'Rich, landed, and talented males from Wales, Scotland, England, and, to a lesser extent, Ireland became welded after the 1770s into a single ruling class that intermarried, shared the same outlook, and took to itself the business of governing, fighting for, and profiting from greater Britain' (Colley, 1992, p. 325).

British nationalism is an 'imperial nationalism'; a nationalism that stresses a political mission rather than an ethnicity (Kumar, 2000). The political conception of British imperial nationalism allowed Wales to navigate both identities: Welshness and Britishness in tandem. Their cultural understanding of being Welsh rested upon a civic structure that was both British and imperial. This may at first seem anachronistic, but it lends itself to a conceptual fuzziness that, in the long term, makes internal cohesion easier. Within British nationalism, there could exist a degree of ethnic pluralism and distinctiveness among its nations, while each could come together under the umbrella of the 'political nation', supported by a shared sense of imperial domination and empire. In this regard, Britishness was not an imposition, but an identity that complemented one's nationality (McCrone, 2002, p. 182). The first and only Welsh prime minister, David Lloyd George, exemplifies

this reality. Following his election victory in 1890 he stated that ‘we are imperialists because we are nationalists. We know that by the sum of the success, prosperity and happiness attained by little Wales, the great Empire of which she is a part will be the more glorious.’

Britain came to be identified with the crown, Protestantism, Parliament and the empire. Each group within Britain could share in this achievement. The Industrial Revolution highlighted the relationship between Wales, Scotland and England, reinforcing their shared Britishness.⁶ The rise of industry was truly a British phenomenon, providing a signifier and marker with which each ethnic group could identify. Britain, not England, was the world’s first industrial society and Wales became the first proletarian nation. This industrialisation progressed in tandem with Britain’s expansive overseas empire, where the power of one reinforced the other. Britain was at the core of the world-system, and entry into its exclusive club meant that Wales, too, could ascend the economic ladder.

Wales was both proletarian and imperialist, proudly Welsh yet a vital cog in the British Empire; a nation whose self-view was contorted by straddling these two worlds (Parry, 2020b). These high watermarks in Welsh culture never truly posed a real challenge to Britishness or the British state. An ethnic Welshness fit neatly within a wider political Britishness. The pioneers of romantic nationalism in Wales never sought to overturn the political order. They were resigned to high politics and a romantic interpretation of the nation was not a sufficient reason for the working classes to champion nationalism.

Nonconformism and the failure of Welsh liberalism

During the late nineteenth and early twentieth centuries, two pillars defined Welsh life: liberalism and nonconformism. The influence of

6 Ireland was always seen as an unfortunate addendum to the notion of Britishness: it was a Catholic nation with much more aversion to the ideas of Britishness than the other minority partners in the union.

the Liberal Party on Wales was extensive. In the general election of 1885, the Liberals won 29 of the 34 seats in Wales, and in 1910, they secured 26 of 36 seats. By 1922, however, the Liberals managed only 8 seats. Initially, the form of liberalism espoused was distinctly Welsh: it was not an imported ideology but one that resonated with the social and cultural realities of Wales. It aligned itself with the nonconformist tradition; the religion of *y werin*. It spoke in the Welsh tongue, and through the political movement Cymru Fydd (once led by a young Lloyd George) promoted some form of home rule (but not outright independence). While the aims of this movement were restricted to the search for symbolic recognition of Welsh culture and Welsh distinctiveness, it did at least speak to and for the Welsh people (Rawkins, 1978, p. 524).

Lloyd George and the Welsh Liberals merged issues of national and religious identity. The Tories were viewed as the party of the elite, representing the coal and steel magnates, the English middle classes and the Anglican church (which is still known by some as the Church of England *in* Wales). In contrast, Liberals argued that they spoke for the common Welsh people: the nonconformity of the Welsh was politicised and reflected their sense of difference from the English and their economic masters, whether Welsh or English.

Nonconformism offered a vehicle for the working and rural classes of Wales to resist the hegemony of their landlords and bosses. It grew so dramatically precisely because it offered means to oppose them. 'It created an ideological space enabling the tenantry and workers to step outside their dependence and subservience and to perceive the landlords and bosses as exploitative' (Adamson, 1991, p. 105). Nonconformism was a means of expressing class resistance and struggle in an embryonic form. The capitalists might be kings on earth, but not in heaven.

The Liberal Party machine had its roots in the newly developing industrial sectors of nineteenth-century Welsh society. They represented an indigenous bourgeoisie, yet one with links and interests under the wider British umbrella. This ideology was

based on liberal individualism and free trade (Williams, 1989, pp. 48–51). Emerging from the old Whig Party, this capitalist class sought to dismantle the political supremacy of the landed elite. Soft nationalism, coupled with nonconformism, was the ideological strategy of the Liberal Party to forge a class alliance between the rural tenantry and the industrialising south.

Yet this union dissipated almost as quickly as it had emerged, with liberalism failing to enact its historic mission: it could not undo the tensions that existed between the Welsh working class and its rising middle class. The newly emerging Welsh middle class had to decide whether to ally itself to the British state. Liberalism had stressed Welsh grievances and the alien nature of Anglicanism, yet it had also sown the seeds of its own destruction. Bolstered by Britain's position in the world-system, Welsh Liberals maintained that the best way to improve Wales's position was under the umbrella of Britishness, despite their allusions to Wales's peripheral status within it. Liberalism was unable – or unwilling – to address the material questions now being posed by Wales's working class, who demanded bread on earth as well as in heaven. The Liberals found themselves in no man's land, crushed between the millstones of labour and capital, as working-class militancy and the growing popularity of the Labour Party pulled the radical Liberals in one direction, while capital sought refuge in the Tory Party on the other.

In essence, the Liberals were no longer the party of dissent. While they continued to be Nonconformist religiously, their politics now conformed with those of the capitalist elite.

There was no longer scope for a party which had been both the herald of [political] emancipation and the nurse of capitalism. Now that emancipation had acquired a socialist connotation, these two functions were openly in conflict and, consequently, the Liberal party began to disintegrate, with some of its members pulled to the right and others to the left. (Hutchinson, 1966, p. 16)

The Labour Party, which emerged in 1900, found fertile ground in Wales. By 1935, Labour controlled every seat in the industrial south and polled over 45 per cent across Wales. Their success came from adding a material foundation to the pillars of nonconformism (and, to a lesser extent, soft nationalism). Labour's first leader, Keir Hardie, famously espoused a policy of home rule for the nations of Britain. This policy had more in common with today's devolution than outright independence but showed an accommodation to the social and cultural patterns of Scotland and Wales.

The Labour Party in Wales maintained an affiliation with religious nonconformism. 'For Hardie, Socialism was Christianity at work, the practical application of the Sermon on the Mount to usher in God's Kingdom on earth' (Morgan, 1999, p. 332). Welsh figures like Niclas y Glais and Evan Walters also combined faith with socialism. Walters famously painted *The Communist*, depicting a trade unionist as a Christ-like figure leading his disciples in industrial south Wales.

The Liberal Party was unable to maintain its position of strength in Wales because it no longer spoke for the Welsh people. The attractiveness of their message waned when it became clear that they did not have answers to the questions posed by the people. Liberals found themselves wedged between a romantic understanding of nationalism on one hand and a desire to elevate themselves within the British state on the other. Liberalism came to represent the ruling class that, at one time, it had fought against. The Welsh bourgeoisie sided with the British state rather than its own working class, like the Catalan bourgeoisie in the same period. In reaction to this, the Welsh found unity within their class, rather than in a nationalist class-coalition with the Welsh bourgeoisie. If there was a 'failure' of Welsh nationalism in this period, it was due to the inability of the Liberal Party and the Welsh bourgeoisie to offer a materially better alternative and future to the working class.

Class conflict in Wales

And they blessed Rebekah and said to her, 'Our sister, may you become thousands of ten thousands, and may your offspring possess the gate of those who hate him!'

Genesis 24:60–7

The nineteenth century in Wales was a period of profound structural tension and emergent political consciousness. It was a moment in which the weight of industrialisation created a rupture in Wales's social structure. Iron towns like Merthyr Tudful became emblematic of the new industrial reality. It was densely populated and socially polarised. In the rural west, communities bore the brunt of administrative reform and economic disruption that paid no heed to the older forms of life and social reproduction. What united these disparate contexts was a shared experience of dispossession, and a common response of resistance. The Merthyr Rising of 1831, the Chartist mobilisation of the 1830s and 1840s, and Merched Beca of the 1840s were all expressions of that resistance.

The Merthyr Rising was the first large-scale working-class revolt in modern Welsh history. By 1831, Merthyr was the most populous settlement in Wales, and its existence mirrored the capitalist world-system in microcosm. The town of iron, smoke and steam was home to capitalists like William Crawshay and workers who had no real rights or security. Wages were irregular, rents high and the workers were forced to survive on a trucking system whereby they were paid in tokens only redeemable at employer-owned shops. This kept the workforce both captive and impoverished. Wage reductions were the final catalyst to this intensifying economic crisis, and the Merthyr Rising was born.

For seven days in June 1831, the town was effectively under the control of the workers. The red flag, which later became a universal emblem of socialist resistance, was raised. The local magistrates and the Crawshays fled, and debtors' ledgers were destroyed in a symbolic act of rejection of the system that condemned workers to poverty. The

state acted in the interest of private property. Soldiers were sent in and wrestled control from the workers. At the end of the rising, twenty-six people were sentenced to death. A Welsh working-class martyr was born with the hanging of Dic Penderyn on highly dubious evidence. Merthyr became a foundational moment in the awakening of Welsh class consciousness.

The Chartist movement which followed should be understood within this milieu. It was a continuation of the political and economic struggles that had convulsed at Merthyr. Chartism was the first mass democratic movement in British history – a national project – but one rooted in local grievances. Wales was critical to its development. In towns like Newport, Llanidloes and Pontypool, the injustice faced by the working class expressed itself in demands for rights and suffrage.

In Wales, Chartism took on a distinctly militant character. The Newport Rising of 1839 was the most serious armed challenge to British authority in the nineteenth century prior to the Irish revolutionary period. John Frost led thousands of Chartists to Newport with the intention of freeing their imprisoned comrades. They were met by gunfire and bayonet, leaving twenty dead. Frost and other leaders were arrested, tried for treason and sentenced to death, which was later commuted to transportation following mass protest. While the Newport Rising was a failure in military terms, it demonstrated that the Welsh working class were politically aware and active.

While the Merthyr Rising and Welsh Chartism were urban and industrial in character, Merched Beca was rural and decentralised, originating in west Wales in 1839. At the heart of the revolt was the turnpike system: a network of tollgates which charged fees for road usage. The gates were often operated by private companies under legal charter but with little oversight, and the charges were especially punishing for farmers, labourers and the rural poor. Tollgates were the symptom. The cause was the rise of agrarian capitalism and the enclosure of the commons. Merched Beca emerged from a countryside that was being dispossessed. They changed the biblical passage of Genesis 24:60 to be literal and possessed the gates of those who hated them. The authorities struggled to respond to these guerilla tactics.

The rural nature of the protests made them difficult to police, while the activists enjoyed support from the population, meaning that they could hide in plain sight. Eventually, the government reformed their turnpike laws. In this regard, Merched Beca won.

These movements laid the groundwork for a distinct political culture to emerge in Wales. The image of Wales as a radical, working-class nation owes much to Merthyr, to Chartism, to Beca. While not nationalist movements in a narrow sense, they were deeply Welsh in character, drawing on local grievances, traditions and solidarities. They showed clearly that the politics of the periphery can lead change. All three offer a lens through which to understand the wider European context of the nineteenth century. The rise of socialism, the struggle for suffrage and for workers' rights all found homes in the valleys and farms of Wales.

The memory of these uprisings endures. They remind us that economic systems are never neutral, and that dignity and political rights must be fought for. These movements show us that even the most marginalised communities can evoke change. That resistance leaves a trace. And that peripheral Wales was at the core of the struggle for a better world.

All that is solid melts into air

All that is solid melts into air, all that is holy is profaned, and man is at last compelled to face with sober senses, his real conditions of life, and his relations with his kind.

Karl Marx

The boom years of heavy industry which propelled Wales through the industrial revolution did not last. Gwyn A. Williams (1985) argued that in the nineteenth century, the economic rhythms of North and South America, and mainland Europe were driven by Welsh coal imports. In the twentieth century, Wales crashed on the shores of economic decline and by 1932, 42.8 per cent of all insured Welsh working men were unemployed.

By the early twentieth century, the more easily accessible coal seams of Wales had been exhausted. In this regard, decline could be explained in terms of difficult geological conditions which resulted in high costs of production and dependence upon labour-intensive methods (Day, 2002, p. 33). The south Wales coalfields had always been an area of high production costs. However, Welsh coal was particularly suited for steam-raising, meaning that its superiority in this regard offset its higher production costs. Once the demand for steam-raising coal declined, its higher quality could no longer offset the cost of extraction. While the Industrial Revolution had made energy cheap for a period, the world-system had now moved on, substituting Welsh coal for cheaper alternatives. There was a direct link between the cheapening of other supplies of energy and the rise in costs in Wales. The Treaty of Versailles meant that France and Belgium were now supplied with German coal as war reparations, while the USA began producing and exporting coal more cheaply to South and Central America.

The uncompetitiveness of Welsh coal was also due to technological stagnation. German and American extractive industries had twice the output per man. They both enjoyed the 'advantages of backwardness' (Gerschenkron, 1962, pp. 7–8). When industrialisation began apace in these countries, they could bypass some of the more antiquated systems that existed in Wales, creating an organisational structure of industry which was more modern than existed in the older centres.

The geological, technological and economic backdrop made some reduction in Wales's industrial base inevitable, but this outcome was also political. Wales was an integral but peripheral part of the British economy. When Wales ceased to be crucial to British economic development, its integral role was removed, but its peripheral position remained. Wales had a singular function within British industry and the wider world-system. Wales was fulfilling the role that its comparative advantages assumed from it, yet in doing so, the economy never diversified. 'This combination, an

industrialisation at once enormous and de-centred, was probably unique to Wales' (Nairn, 2021, p. 174).

Post-war (dis)unity

The experiences of the Second World War created a unifying memory and trauma for the people of Britain. From these embers emerged a distinct form of Britishness which found its political expression via the election of the Labour Party in 1945. This was a Britishness which mirrored Wales's aspirations, ideals and culture. This was 'a way of life determined by the National Coal Board, the British Steel Corporation, the Milk Marketing Board, the Co-Op and Marks and Spencer, the BBC, the Labour Party, the EEC, NATO' (Williams, 2003, p. 99).

The new regional development policy introduced by the Labour Party appeared to address the issues caused by the lack of economic diversification in Wales. Keynesian economics brought renewed stimulus to Welsh economic life, with governments extending their involvement in economic management. The Labour government of 1945–51 combined Keynesian economic policy with the creation of the welfare state. Keynesianism attempted to manage demand across regions, aiming to achieve full employment and equilibrium in the long term through incentives for capital investment, public infrastructure and employment. Its role was to 'expand capitalism while offering real but limited concessions to the subaltern classes. It thereby displaced more radical demands while not offering meaningful political inclusion or economic justice' (Bieling, 2015, p. 102). Keynesianism did not address the fundamental causes of unequal development but sought to improve economic conditions within the existing system.

In Wales, nationalised industries such as the Coal Board and Steel Corporation accounted for a disproportionately large number of employment compared to the UK average (Mann and Fenton, 2017, p. 105). Within this conceptualisation, Britain represented the state, nationalised industries and the communitarianism of the

National Health Service. It made sense for the Welsh to remain under the ambit of the British state, with Welsh national politics being expressed through British labourism.

While coal and steel remained significant industries in Wales, their pre-war decline continued. While 300 mines were taken into public ownership in 1947, by 1970 only fifty remained. To counterbalance this loss, the public sector was expanded, education standards improved and the state relocated some of its activities to Wales including the DVLA, the Royal Mint and the Passport Office. Wales and other economically deprived regions were also opened up to Foreign Direct Investment. Multinational corporations like Ford and Hoover opened branch plants in south Wales. Between the mid-1960s and 1970s, 48 per cent of employment growth in Wales was non-Welsh in origin, and by 1973 only 10 per cent of manufacturing plants were Welsh-owned, with branch plants accounting for 70 per cent of manufacturing employment (Jones, 2000).

FDI relies on regional competition, meaning Welsh economic development was dependent on external decision-makers. Wales's lack of control over the decision-making processes of large multinationals, combined with its comparative advantage due to its competitive cost base, led to the provision of low-paid, low-skill jobs. This situation also diverted public funds away from local, endogenous companies (Cato, 2004). There is an irony that while English branch plants in Wales were often viewed with suspicion, German, Korean or Japanese plants were seen as advantageous. The growing presence of non-British businesses meant that investment and production were more tightly linked to global economic trends. In times of economic contraction, branch plants were the first to be affected. These branch plants tied the English and Welsh economies closer together. The British operations of these companies were generally headquartered in London or the south-east of England. This promoted the development of the M4 motorway while also resulting in the manufacturing jobs of Wales being 'low-skilled' and confined to the assembly line. These policies aimed to attract businesses by lowering labour costs and offering private companies tax subsidies.

Thatcherism

Keynesian economics recognised the role of the state in mitigating inequality. This changed with the election of Margaret Thatcher, which embodied an ideological shift. ‘Under the new orthodoxy, the language of competition applied to industries – and increasingly its host regions – within the national boundaries as well as outside’ (Jones, 2015, pp. 276–7). Neoliberalism and the new language of competition meant that it was no longer the state’s role to legitimise and promote the activities of local capital: its role shifted to contend with outside interests and to attract multinational corporations for investment or jobs.

In the peripheries, the state faced two crises. It was unable to bargain successfully with transnational capital, nor was it able to justify restructuring the local environment in favour of foreign capital. The UK’s accession to the European Economic Community further exacerbated the economic advantages held by a small set of metropolitan zones.

This shift was perceived by some to be un-Welsh, which led to a recalibration of Britishness (Osmond, 2002). The devolution referenda of 1979 and 1997 illustrate this point. In 1979, only 20 per cent of those who voted did so in favour of devolution. By 1997, this number had risen to 50.3 per cent. While the winning ‘yes’ vote was slender, it did represent a large increase on just eighteen years earlier. According to census data, the number of those that ‘felt Welsh’ remained stable between the two referenda. However, there had been a profound change in the politicisation of Welshness (Bradbury and Andrews, 2010).

The characteristic of Britishness in Wales was pride in its institutions, especially the welfare state and the NHS (Osmond, 1998). These two pillars of pride began to crumble in the years between the referenda. The Thatcher and Major governments undermined the very institutions that bound the Welsh people to the British project. What Wales experienced during eighteen years

of Conservative government was a bifocal change in both Welshness and Britishness due to the erosion of the social compact.

The fall of empire

The post-war era also witnessed the unravelling of Britain's vast colonial empire. Britishness was a political identity that rested on the strength of the empire and its corresponding core – or hegemonic – position within the world-system. A central pillar of Britishness was crumbling without being replaced. Imperial decline led to a self-consciousness about Englishness distinct from Britishness; a process of self-examination of English identity began. Britain's loss of economic supremacy, increasing dependency on the USA for military and economic support, and deeper entrenchment in the European project all contributed to a diminishing capacity of the British state to act independently in the world-system. This profoundly affected the self-perception of the British.

In the peripheries, the Scottish National Party (SNP) and Plaid Cymru became more visible during this era of decolonisation, with Plaid Cymru winning their first Parliamentary seat in 1966 and the SNP following in 1967.⁷ These parties attempted to frame their struggle within the decolonial paradigm, viewing nationalist resurgence in the 'old' Great Powers of Europe as the final stage in the fight against imperialism (Mullen and Gibbs, 2023). This perspective found its most ardent academic support in the work of Michael Hechter.

However, the real impact of decolonisation on nationalist demands at home was more closely linked with Britain's relegation in the world-system, which was accelerated by the loss of empire. Political nationalism in Wales began to rise just as the British state's power was diminishing. Contrary to claims made by some nationalists, it was not an overbearing, overpowerful British state that fuelled the flames of nationalism. It was the retrenchment of

7 The SNP did have a Parliamentarian elected in 1945 in a by-election during the war yet lost the seat later that year.

the British state from its role as arbiter of the welfare state and British capital. The rise of transnational capital and the state's unwillingness or inability to address this reality contributed to the erosion of Britishness. The nature and function of the state had shifted: it was no longer aligned with British capital and industry but instead worked as a conciliator for transnational capital. The changing economic, political and social functions of the state tore at the social fabric of Britishness. The outcomes of decolonisation, Britain's new position in the world-system and Thatcherism thus gave rise to a new form of political Welshness, which expressed itself by narrowly voting in favour of some national autonomy. The hope was that this would signal a new dawn for Wales and its economy.

'New' Wales, old problems

There are decades where nothing happens.

Vladimir Lenin

The twentieth century has now drawn to a close, yet Thatcher's economic logic of competition between geographical areas persists. This remains true despite the advent of a 'New' Labour government and the creation of institutions such as the Welsh Senedd. Under Blair's premiership, Labour introduced supply-side policies focused on skill promotion (Schmidt, 2019). The rationale was that these skills would enhance employability, making workers more flexible and better able to adapt to a post-Fordist economy. Such skills were expected to reduce regional inequality by boosting the comparative advantage of the entire UK relative to abroad.

At the Welsh level, attracting FDI remained a stated policy goal of the government, with Wales's 'competitive cost base' continually referred to (Welsh Government, 2015, 2017). Wales's reliance on FDI, which tends to be low-wage, 'low-skilled' and mobile, has exacerbated the atomisation of the UK's economic structure. Figure 14 shows the GDP per capita rankings of the regions of the UK. The top three regions in 2007 were the same in 2023, while the bottom three remained

unchanged between 1998 and 2020. The middle-ranking regions shift places with one another but are neither breaking into the higher tier nor falling into the lower tier. Due to regional competition, Wales contends with other underdeveloped regions for capital investment, while higher-value capital and headquarters move to regions such as the south-east of England and, more recently, Scotland.

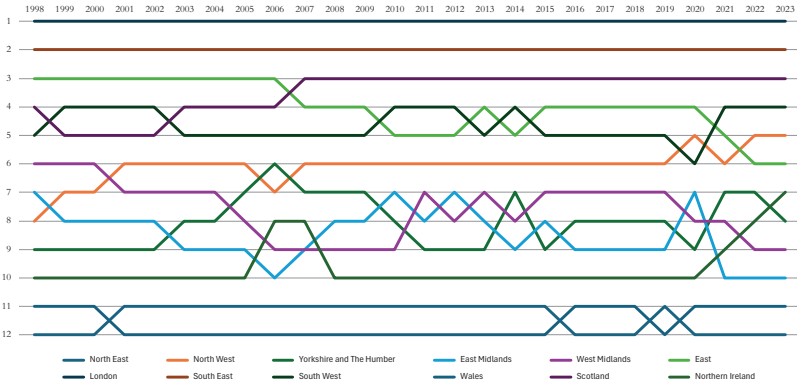


Figure 14: GDP per capita ranking UK (author's own).

In economic terms, what is particularly striking is the disparity between London and the rest of the UK. London is in its own stratosphere, followed by a second tier of overdeveloped regions, such as the south-east and east of England and Scotland. The north-east of England and Wales occupy a separate category at the bottom.

There is an argument that the London economy and its ‘redistributive’ power are crucial for the vitality and health of the UK economy at large. London makes a fiscal transfer to other regions, and that the tax take in Wales is lower than spending. Yet, this overlooks the crucial point that debt funding in Wales is directed towards sectors that perpetuate its reserve army of labour, rather than areas that could foster substantial developmental growth. Essentially, Wales’s role within the international division of labour is to serve as a region of surplus labour power, exploited in times of economic expansion and left idle during contractions. Consequently, Wales depends on the whims of foreign and English

inward investment. UK government expenditure is directed towards industries and services that maintain Wales in a dependent and underdeveloped position, while expenditure in London focuses on sectors that generate higher-value capital. This unevenness in the way that capital and space have been reproduced in the UK has led to social dislocation, with this being embodied in the Brexit vote and different voting patterns across geographic areas.

How leave was my valley?

On 23 June 2016, a slim majority of those who voted in Wales chose to leave the European Union. This result was unexpected, as the prevailing view was that the Welsh were more Europhile than their English counterparts. This was partly because the EU provided an outlet for Welsh identity separate from the British/English axis, and partly because Wales was a net beneficiary of EU funding. Richard Wyn Jones noted that ‘it is clearly the case that Euro-scepticism is not a prominent feature of Welsh political culture’ (Wyn Jones and Rumbul, 2012). While this was certainly true for political parties in Wales, the Welsh electorate opted to disregard their politicians’ views and vote narrowly in favour of leaving the EU. This led Wyn Jones (2016) to remark that Wales had ‘shot itself in the foot in this referendum’. The Welsh voted for Brexit in numbers comparable to their English counterparts, leading to the assumption that their motivations were similar.

A discourse appeared that argued the Leave vote in Wales was swayed by English immigrants (Leake, 2019). However, there was a distinct Welsh dimension to the voting patterns, reflecting different understandings and conceptualisations of Welshness. For instance, nine of the fifteen local authorities and seven of the ten constituencies with the highest Brexit support had a higher-than-average proportion of Welsh identifiers. Strong Welsh identifiers had a strong predisposition to vote Leave.

Euroscepticism in some parts of Wales has a longer history than is often acknowledged. In the 1975 referendum on continued

membership of the European Community, Wales's vote to remain was lower than the UK average. In 1998, 34 per cent of respondents in Wales considered British membership of the EU to be a bad thing, compared to 30 per cent who viewed it positively. This contrasted with Scotland, where 9 per cent thought membership was a bad thing and 54 per cent considered it beneficial (Haesly, 2001). In 2012, only 26 per cent of people in Wales supported EU membership, while 52 per cent were opposed (Knight et al., 2012). 'Welsh Only' identifiers in Wales were more likely to view UK membership of the EU as a negative (38 per cent) compared to 'British Only' identifiers in Wales (31 per cent) (Henderson et al., 2016). Despite calls to the contrary, Euroscepticism – or at least Euroambivalence – has a long history in Wales and cannot be attributed solely to the English immigrant.

Not all of Wales voted for Brexit, and different places and people had various motivations for their choices. Five of Wales's twenty-two local authorities voted in favour of Remain: Ceredigion, Gwynedd, Cardiff, the Vale of Glamorgan and Monmouth. Initially, there does not seem to be a clear pattern explaining why certain places voted Leave or Remain. Cardiff, the Vale and Monmouth, for instance, share some common characteristics, such as being generally wealthier parts of the country. However, Ceredigion and Gwynedd do not fit this pattern. Both are part of what is termed *Y Fro Gymraeg*, the Welsh-speaking heartland. This area has a particular articulation of Welshness that aligns with support for the European project. Welsh identifiers here are more likely to view European identity as recognising diversity and pluralism, with Welshness and Wales having a place within Europeanness (Jones, 1992, p. 332). These attitudes align broadly with those of Plaid Cymru, who are strongest in this part of Wales. Elias (2013, p. 48) noted that 'Europeanist ideas' have shaped Plaid Cymru's constitutional thinking, viewing Europe as a platform for cooperation among small nations in a broader international context.⁸ Furthermore,

8 In the 1970s Plaid Cymru were against Wales's membership of the EU, although they still had 'Europeanist' ideas. The form, however, has changed.

a clear link exists between Welsh-language proficiency and the propensity to vote Remain: 72 per cent of fluent Welsh speakers voted Remain while an impressive 84 per cent of Welsh-identifying Welsh speakers voted Remain, making them possibly the most pro-EU demographic group in Britain (Larner, 2019; Wyn Jones and Larner, 2021).

Why Anglesey and Carmarthenshire did not vote in the same way as Ceredigion and Gwynedd requires some explanation, as these areas are also within *Y Fro Gymraeg*. The ‘problem’ of Carmarthenshire and Anglesey arises because their geographical zones cut across culturally complex boundaries. Eastern Carmarthenshire shares many characteristics with the Welsh valleys, such as the presence of mining towns, while the coastal south more closely resembles Swansea to its east. The areas that more closely align with *Y Fro Gymraeg* are found in the west and north. Anglesey, on the other hand, represents a mixed representation of Wales with a large English population, a substantial Welsh-speaking, Welsh-identifying rural population, and a Welsh-speaking working-class population that more closely resembles the communities of the south. The difference in these places, therefore, lies in the composition of the balance of forces, with different articulations of Welshness and Britishness present in varying numbers. Areas of Carmarthenshire and Anglesey that identify with *Y Fro Gymraeg* are likely to have voted similarly, yet the mass of this group was smaller than in Ceredigion and Gwynedd. This voting pattern, therefore, does not disprove the argument.

Eastern Wales has a more prominent British identity than *Y Fro*. Due to the stronger presence of a British identity, a core of constituents likely voted for Brexit for similar reasons as their English counterparts. The area ‘has a higher ratio of males to females; has a relatively old population (significant given the correlation between older Welsh people and British identity); and a significant minority (47%) of the population born outside Wales’ (Evans, 2019, p. 3). Men were more likely to vote Leave than women, as were older people and English identifiers in Wales. Welsh-language competency is also

lower. While not analogous, these areas are likely to have followed similar reasonings to England for voting Leave.

In the south Wales valleys, each constituency voted Leave. This area is historically strongly Labour-supporting, strongly Welsh-identifying and received substantial EU funding. Due to historical amnesia, there is a view that the Labour Party has always supported European membership and integration and that this was the ‘natural’ left-wing position. Historically, this has not been the case. In 1975, Labour held a special conference to debate Britain’s membership of the EEC; by almost 2:1, the membership voted Leave. A large bloc of these votes came from the National Union of Miners and the Transport and General Workers’ Union, both of which had a significant presence in Wales (Saunders, 2018). Strong civic institutions within the social milieu of Welsh Wales were therefore Eurosceptic. While the ‘Yes’ vote won in 1975, the working class were more than twice as likely to vote against EEC membership than those in AB social grades.⁹ Furthermore, voting to stay was lower among union members and 88 per cent of Conservative supporters voted to stay compared to 58 per cent of Labour members (Clements, 2017). The main thrust of opposition to the EEC stemmed from the left, which viewed it as a capitalist club; a majority of voters (54 per cent) who wanted more nationalisation in the economy voted to leave, while 79 per cent of those who wanted no further nationalisation or more private companies voted to stay.

This reality shows that Euroscepticism has a long history within the socialist tradition and is not an outlier position. Throughout the 1980s, this position was expressed by the left of the Labour Party, particularly by Tony Benn and Michael Foot (an MP for Ebbw Vale and Blaenau Gwent), with even a 1983 manifesto commitment from

9 ABC1/C2DE social grade classification is a UK demographic system that categorises households based on the occupation of the chief income earner. ABC1 broadly denotes middle-class and lower middle-class groups (A: higher managerial, administrative or professional; B: intermediate managerial or professional; C1: supervisory or clerical), while C2DE refers to skilled working class and lower-income groups (C2: skilled manual; D: semi- and unskilled manual; E: state pensioners, casual or lowest-grade workers, unemployed).

Labour to withdraw from the EEC. Membership was viewed with disdain by this wing of the party because it was thought it would entail the loss of national sovereignty, making left-wing political actions particularly difficult (Tranmer, 2020).

Many of these same issues were raised during the Brexit referendum of 2016, with the left viewing the referendum through the lens of popular sovereignty and ‘resisting neoliberal Europe’ (Eklundh, 2021). Lexit¹⁰ was supported by trade unions such as the National Union of Rail, Maritime and Transport Workers, ASLEF, and BFAWA, while Arthur Scargill – leader of the NUM during the miners’ strike – stated that EU membership made the miners’ position particularly difficult in the 1980s, leading to his support for Brexit (Barnett, 2018). Traditional Labourism still holds an important place within the social milieu of the valleys, suggesting that it was not the people who changed their views but the Labour Party that changed theirs. This is a specific understanding of Welshness and Britishness that lends itself to supporting Brexit. The outcome here reflects the ghost of Labour past haunting the current British establishment.

These areas were expected to vote to Remain because they were net recipients of EU funding. In 2014, Wales received a net benefit of £245 million, roughly equating to 0.4 per cent of GDP (Ifan et al., 2016). This money was not well spent. White elephants such as Technium were criticised, while EU funding created a parasitic mindset within the Welsh civil service and civil society. Wales qualified for territorial cohesion funding without fail, yet the ability of this funding to influence citizens to vote Remain depended on whether they witnessed clear improvements in living standards during the funding period. Instrumentally, the failure of funding to alter economic outcomes is epitomised by Ebbw Vale, which had both the highest unemployment and Leave vote percentage in Wales (Jones, 2017). This was a clear example of revenge by a place

¹⁰ ‘Lexit’ (short for ‘Left Exit’) refers to a political position within sections of the left that advocated the United Kingdom’s withdrawal from the European Union on socialist or anti-neoliberal grounds.

that does not matter (Rodríguez-Pose, 2018). The Brexit vote was born from the decades-long abandonment of many parts of Wales. The people who lived there were the losers of globalisation and this is reflected in the characteristics of those more likely to vote Leave:

70% of those finding it difficult to manage financially.

60% of those just about getting by.

76% of those who think things have got worse for them rather than other people.

59% of those who consider themselves working class.

66% of those with an income of less than £1,200 per calendar month.

57% of those with an income between £1,201 – 2,200 per calendar month. (Swales, 2016, p. 7)

Globalisation and its unevenness are intimately linked with Euroscepticism and distrust of the political establishment. This discontent did not start in the years leading up to 2016; this has been a continuous process for at least the last fifty years. These people did not leave ‘mainstream politics’; politics left them.

Finally, Cardiff and the Vale of Glamorgan have reconceptualised Welshness and have constituted what I term Cosmopolitan Wales.¹¹

¹¹ I do not use ‘Cosmopolitanism’ to denote multiculturalism, nor necessarily something positive. I have discussed in another place Europe and cosmopolitanism: ‘This intellectual and political project has attempted to create a “cosmopolitan Europe”, one that recognises the institutional commonalities that European countries share whilst also celebrating its cultural diversity. The EU’s motto, “united in diversity” is meant to reflect this. However, the diversity that the EU speaks of is narrow in nature and obfuscates the “otherness” implicit in its definition. The EU’s definition relates only to the linguistic and cultural diversity of constituent members, the multiculturalism that exists within member-states is not conceptualised within this understanding of diversity. According to Bhambra “these multicultural others are not seen as constitutive of Europe’s own self-understanding – or as legitimate beneficiaries of the post-war social settlement – emerging from its history of colonialism; a history that is carried by individual nation-states and ... by the common European project itself”. The EU in effect has managed to create a dichotomy between cosmopolitanism on the one hand and multiculturalism on the other. Europe is cosmopolitan and those “high value migrants” it covets are as well. Poorer migrants denote multiculturalism and are therefore dangerous to the European project’ (Parry, 2021).

This Welshness is based on an institutional, civic conception linked with the EU, the Senedd and British institutions that have moved to Wales, such as the BBC and HMRC. At the inception of the Senedd, there was a hope that Welshness itself would be recalibrated and that civic institutions would be at the heart of this Welshness (Osmond, 2002, 2004; Jones and Lewis, 1999). This was to be a Welshness based on bilingual education, public administration, devolved government and a Welsh civil society. This conceptualisation has not taken root outside the narrow confines of Cardiff and the Vale. Cardiff and its hinterland have become decoupled from the rest of the country. This new Welshness and the institutions it is based on are intimately linked to the European Union. One of the very first tasks of the Welsh Assembly was to spend and administer EU structural funds; 1,700 people were employed solely to administer these funds (Cooke and Clifton, 2005, p. 443).

The European Union, therefore, contributed to the expansion of a new – ostensibly Welsh – civil service and bureaucracy. A significant number of projects are concentrated in Cardiff, which acts as the managing authority for all EU funds in Wales (Crescenzi et al., 2020). Cardiff thus serves as a redistributive, administrative and bureaucratic centre for European money, interacting with institutions such as the UK Government, the Senedd, public sector and third-sector institutions, thereby creating a nucleus of ‘high-value’ jobs in the city. This is reflected in Cardiff’s economic structure. The city has the highest number of jobs in Wales in sectors such as financial services, ‘professional’ jobs, public administration, production, real estate, construction and IT services. Moreover, wages in Cardiff are on average 11 per cent higher than in the rest of Wales (Welsh Government, 2023a).

The new geographic reality has improved Cardiff’s comparative advantage relative to other parts of Wales, further exacerbating the inequality between regions. Once again, the prospects for underdeveloped areas are shaped by external decisions and forces over which they have little control. This time, however, the decisions were made in Cardiff rather than London. The supply-side policies

of Blair and the subsequent Welsh and British governments aimed at fostering skills promotion have solidified the economic gravity of Wales towards Cardiff. The Vale of Glamorgan, therefore, represents the ‘leafy suburbs’ of outer London, where professionals and the new bureaucratic class can live outside Cardiff: the strength of one feeds the other. Consequently, the Welshness of this area is closely tied to this newly emergent socio-economic milieu, where a Remain vote not only reflects the views of this social group in instrumental terms but also expresses the state-bureaucratic identity of the city and its hinterland.

When was Wales?

The Welsh electorate in 1979 wrote finis to nearly two hundred years of Welsh history. They rejected the political traditions to which the modern Welsh had committed themselves. They declared bankrupt the political creeds which the modern Welsh had embraced. They may in the process have warranted the death of Wales itself ... What seems to be clear is that a majority of the inhabitants of Wales are choosing a British identity which seems to require the elimination of a Welsh one.

...

One thing I am sure of. Some kind of society, though God knows what kind, will no doubt go on occupying these two western peninsulas of Britain, but that people, who are my people and no mean people, who have for a millennium and a half lived in them as a Welsh people, are now nothing but a naked people under an acid rain.

Gwyn Alf Williams

After the first devolution referendum in 1979 had ended in overwhelming defeat, Gwyn Alf Williams (1985, p. 305) painted an apocalyptic vision of what would become of Wales. The persistence of Wales is itself a historical fact of enormous significance considering it has survived conquest, union, industrialisation and migration in

the shadow of a much larger nation. But for Gwyn Alf, the results of 1979 confirmed the fragility that still existed. The Welsh had refused the chance to will themselves into political existence through devolution. It appeared that they had stopped choosing to make and remake Wales. They stood, he suggested, as ‘a naked people under an acid rain’.

The rain was acid because the historical atmosphere itself had become corrosive. The old industrial world was beginning to break, and the institutions of organised labour were about to face their most severe assault. The social settlement that had given Britishness much of its meaning in Wales was entering its long crisis; at precisely that moment, Wales refused the limited political shelter that devolution offered.

Gwyn Alf understood that nations are not born; they are made. Nations do not grow like a tree; they are manufactured. Wales was not a primordial essence that had lain untouched beneath the surface of history. It was an artefact produced through struggle and choice. It existed because people acted as if it existed; because they spoke, worked, worshipped, fought, remembered, sang, organised and imagined within a Welsh frame.

The 7 May 2026 Senedd election may in time be remembered as one of those moments of making. The day after, the people of Wales emerged into a political landscape that had been turned upside down. The Senedd election results had delivered a verdict so startling that the sky was lit up by it. Plaid Cymru had won 43 seats in the expanded 96-member Senedd; Reform UK Wales followed with 34; Labour, the party that had dominated Welsh politics for over a century, had collapsed to just 9 seats. The Conservatives won 7; the Greens 2; the Liberal Democrats 1. For the first time since the advent of mass democracy in Britain, Wales would be governed by a party whose central *raison d'être* was the proposition that Wales should govern itself.

An electoral shock of this magnitude invites immediate explanation in proximate causes. But to do so is to mistake the foam on the wave for the tide itself. Every election, in a sense, is a conjuncture;

a meeting point of multiple historical rhythms; they are a moment when deep structures of the *longue durée* suddenly break through the surface of routine events. The 2026 election was the point at which several long-term processes reached critical mass. It was the political expression of a century of uneven development, a half-century of deindustrialisation, a quarter-century of devolutionary constraint, and a decade of British state crisis. To grasp its meaning, we must descend beneath the ephemeral realm of *l'histoire événementielle* into the slower rhythms that create the substance of history. The result was a political earthquake whose epicentre lay not in the events of the campaign but in the deep structures of Welsh history.

For most of the twentieth century, the Labour Party performed an extraordinary political function in Wales. It managed to reconcile and synthesise Welshness and Britishness. It allowed working-class communities to feel both Welsh (in culture, memory, and solidarity) and British (in political allegiance, in access to the welfare state, in participation in empire and its aftermath). The post-war settlement gave Britishness a social content it had previously lacked. The National Health Service, council housing, nationalised industries, trade union recognition, and secondary education for all: these were Britain. For the Welsh working class, voting Labour meant voting for their work, union power, healthcare, pensions and children's schooling. It also meant voting for a party that respected Welsh cultural distinctiveness without demanding a constitutional rupture. Welsh Labourism was the political form of a specific class compromise whereby the British state would provide social security in exchange for political loyalty. Welsh national feeling could be expressed culturally, but constitutionally it would remain inside Britain. This political function was so totalising that Labour received the highest share of the vote in Wales in every general election since 1922.

Braudel (2009, pp. 178–9) taught us that certain human structures change so slowly they appear to be permanent features of the human landscape. They become pillars and obstacles. They are pillars because they support the weight of generations, obstacles

because they confine human action within narrow corridors of possibility.

Certain structures, in their long life, become the stable elements of an infinity of generations. They encumber history and restrict it, and hence control its flow. Other structures crumble more quickly. But all structures are simultaneously pillars and obstacles. As obstacles, they provide limitations from which man and his experiences cannot liberate themselves. Think of how difficult it is to break through certain geographical frameworks, certain biological realities, certain limits to productivity, even one or another spiritual constraint. Mental frameworks are also prisons of the *longue durée*.

The near-identification of Wales with Labour was one such *mentalité*. For much of Wales, Labour was the political expression of Welshness itself. It was the language through which class, community and national belonging were translated into institutional form. The erosion of this pillar began with the unravelling of the social compromise between Labour and the working class in the 1980s. British capitalism had entered a long decline from its nineteenth-century hegemonic position in the world-system. The loss of empire, the rise of competing economies in Germany, Japan and later China, the financialisation of the British economy. All these processes slowly stripped Britishness of its material content. What did Britishness mean when British industry was closing? What did the Union Jack represent when the welfare state was being dismantled? Even after 1997, Labour offered no alternative vision of Britishness that could replace the social-democratic settlement.

The decline of Welsh Labour was not sudden, but a process of gradual erosion, like a coastline worn away by the sea. Over decades, the landscape of Welsh political life changed. Labour's vote share shrank in election after election in the Welsh heartlands since at least the advent of Blair. The institutions that had anchored Labour in working-class communities lost their density and their authority. A new generation grew up for whom the great struggles

of the coalfields were lessons of history rather than lived experience. A new economy emerged, based on low-paid service work, public sector employment, and the tourism and hospitality industries, all exposed to the tides of capital.

Until now, the decline was masked by Welsh Labour continuing to limp over the line in devolved elections through a mixture of apathy (until 2026, turnout had never passed 50 per cent in Senedd elections) and the skilful deployment of a ‘soft-nationalist’ brand that neutralised Plaid Cymru. (Evans, 2026)

Whilst the Labour Party had become unpopular, it lost in 2026 because it had exhausted its historical function. The party could no longer mediate between Welshness, Britishness and class within a single political formation. The British state could no longer promise security, improvement and dignity. It could offer only austerity, managed decline and the endless administration of scarcity. Welsh Labour had become the face of that administration, of the slow, grinding maintenance of a status quo that no one could defend with conviction.

We must be careful not to present the 2026 election as the sudden birth of Welsh nationalism. Welsh national feeling has existed for centuries. It has survived conquest, incorporation, religious Reformation, industrial revolution, linguistic decline and the cultural homogenisation of modernity. It has found expression in the structures of everyday life. However, it has rarely been the organising principle of mass politics. The shift that occurred in 2026 was a shift in the relationship between national feeling and political form. Welshness remained widely felt, but the political vehicle that had historically expressed it had lost its capacity to do so. The Welshness that Labour expressed had always been a specific variant. It was a Welshness that was real and deep, but it was also historically specific. It belonged to a particular configuration of class, economy and state. As that configuration dissolved, the Labour expression of

Welshness began to dissolve with it. What remained was a diffuse national feeling looking for a new political articulation.

Into this vacuum stepped two parties, representing two nationalisms and two competing interpretations of crisis, locked in dialectical opposition. Plaid Cymru spoke for a Welsh nationalism of self-government, social democracy, linguistic revival and European orientation. Reform UK Wales spoke for a British nationalism of restoration, anti-devolution, anti-immigration, anti-liberalism and a return to an imagined past of sovereignty and strength. The parties became antipodes whereby each defined itself against the other.

The relationship between them was dialectical in the precise sense: each shaped the meaning and the appeal of the other. Reform's rise made Britishness visible and aggressive in a way it had not been for a generation. For much of the devolved period, Britishness had operated as ambient, banal background noise. Whilst it existed, it was not used as a banner around which voters would rally. Reform changed this state of affairs and weaponised Britishness, turning the Union Jack into a partisan symbol in the process. In doing so, it forced a question that Labour's synthesis had tried to avoid: whose side are you on?

Plaid Cymru benefited from this clarification. Reform's rise created the crisis-condition through which Plaid's minority nationalism became electorally mobilised. A vote for Plaid became a vote for Wales as a political subject. It became a vote against the British nationalism of Reform. The election results reflected this polarisation. The country split not along the old three-Wales model (Balsom, 1985) of *Y Fro Gymraeg*, Welsh Wales and British Wales, but along a simpler axis. On one side, stood Welsh-identifying, pro-devolution, socially liberal voters. On the other side, British-identifying, anti-devolution, socially conservative voters. Labour was crushed between the millstones of Welshness and Britishness, as the Liberals had been crushed between the millstones of labour and capital a century before.

The symbolic force of this realignment was clearest in Blaenau Gwent Caerffili Rhymni. Tredegar, birthplace of Aneurin Bevan

and Neil Kinnock, had once stood as part of the sacred geography of Welsh Labourism. Yet in 2026, the constituency returned no Labour members at all. Its six seats were divided evenly between Plaid Cymru and Reform. The old Labour heartland itself was split between two rival answers to the crisis of Britishness.

Plaid's historic difficulty was that it appeared as the party of one form of Welshness rather than the political form of Wales as a whole. It did not always speak naturally to the Welshness of the valleys. The significance of 2026 is that this distance appears to have narrowed. *Y Fro Gymraeg* and Welsh Wales may now be moving into a shared political field. While their histories and social structures remain different, they may have begun to recognise themselves within a common national act. Nationhood is created when differentiated people decide that their differences belong within a shared political project. Wales does not need to become culturally uniform in order to become politically real. A nation is a relation between fragments; it is a decision to make common life from uneven inheritances. *Y Fro* and Welsh Wales do not need to become the same, but become politically joined in an act of creation.

The election therefore has to be understood through the dialectical relation between majority and minority nationalism. Reform was the crisis-form through which Britishness returned to Welsh politics as an aggressive and explicit electoral force. Plaid's success must be read in relation to that emergence. Minority nationalism does not rise mechanically because a people possess a language, a culture or a memory of difference. If this were true, nationalist mobilisation would be constant. Welshness has existed for centuries. The Welsh language, despite repeated pressure, has endured. Wales's uneven development within Britain has been visible for generations. Yet national identity, linguistic distinctiveness and economic unevenness do not in themselves produce a political breakthrough.

The missing element is structural crisis. National identity and uneven development are the building blocks of minority nationalism, but crisis determines whether these elements remain

latent or become politically active. Under ordinary conditions, the state mediates unevenness and difference can be contained. It can be expressed through culture or localism, but under crisis those same differences become reorganised. Questions of belonging and power become central. Which state? Which nation? Which people? Which future?

This election has opened a possibility. For the first time in the modern history of Wales, the possibility exists that the country might move from being an object of history – a place acted upon by larger forces – to being a subject within it. ‘The result is a political culture radically different to England, and unique within the United Kingdom ... For the first time, we can observe a politics that is distinctly, identifiably Welsh’ (Leaman, 2026). There is a temptation, after an historic election, to write as though a new epoch has already arrived. History rarely moves so cleanly. The answer is uncertain. History is not the sum of inevitabilities. A moment of national possibility can become a passage to transformation or an interlude before restoration. The future of Welsh nationhood will be decided in the struggle between these currents.

The final meaning of 2026 will be decided later by history, just as 1979 was. Perhaps this is the answer that 2026 offers to Gwyn Alf Williams. Wales was then, Wales is now – and Wales will be, when the Welsh make it. The task of creating Welsh self-government must overcome the weight of history. ‘Dead generations weigh like an Alp on the brains of the living’ (Williams, 1979, p. 22), and this task belongs to them. Whether this possibility becomes reality is now the question that will shape Wales’s next chapter.

Conclusion

Many shadows drifted across the hills of Wales and the people that hold them – the eagles of Rome, the ravens of the North, the vultures of London. But always we have stood firm. The Welsh people are, and the Welsh people shall be.

Harri Webb

This chapter has sought to understand Wales as a social formation, shaped by its own internal conditions and broader historical, ecological and economic systems. What emerges is a complex and uneven pattern of integration, disruption and resistance.

To write a history of Wales through the lens of political economy and the *longue durée* is to understand that the nation is not an autonomous or endogenous driver of history, but is embedded within the often uneven and contradictory outcomes of larger structural processes. Wales was not left to its own devices, able to walk a path of steady economic and state development. Rather, it was continually made and remade through its role as a periphery.

This peripheral position has imposed certain structural constraints on the Welsh historical experience. It has meant that political sovereignty has rarely been exercised from within. Law, governance and institutional structure have largely been imposed from without, often justified in the language of integration, reform or civilisational uplift. At the same time, Wales has been consistently integrated into systems of economic accumulation that extract value while limiting local control over production and distribution. The result is a society repeatedly reorganised by external logics whether imperial expansion, market demands or military priorities. Wales, in this sense, has rarely been the subject of its own history in the traditional mode. It has instead been a site where larger systems of rule and profit are enacted.

In the absence of statehood, culture has often borne the weight of continuity. Language, oral memory, customary law and religious dissent all functioned as mechanisms of cohesion in a fragmented landscape. These were forms of resistance embedded in material routines and the structures of everyday life. Wales has always retained a stubborn cultural distinctiveness rooted in its geography and its modes of life.

Statehood in some form is no longer absent. The establishment of a Welsh Parliament has brought symbolic recognition and modest administrative competence, but it has not altered the fundamental economic geography of Wales. The Senedd governs in

the shadow of a state that retains sovereignty over energy, borders, foreign policy and fiscal redistribution. In this light, the limits of the devolutionary settlement are structural. Without economic levers, political authority becomes managerial rather than transformative.

What then does the Welsh case reveal to the historian interested in method? First, it reveals the insufficiency of national frameworks for understanding societies historically positioned as subordinate or incomplete. Wales cannot be understood through the categories of the sovereign nation-state. Its history requires attention to geography, to ecology, to the long-term rhythms of class and capital, and to the uneven flows of empire. It reveals the power of the *longue durée* to situate seemingly local developments in systemic context. The persistence of the Welsh language, the fragmentation of its political units, the rise and fall of its industrial economy are not isolated phenomena. They are the outcomes of centuries-long patterns in which landscape, labour and accumulation interact. To understand why Welsh nationalism emerged when it did, why certain regions remained linguistically resilient, or why deindustrialisation proved so socially corrosive, one must look beyond proximate causes. These outcomes were structured by historical paths laid down over generations: by topography, legal regimes, trade routes, imperial priorities and forms of social reproduction rooted in the land.

Finally, the case of Wales reminds us that the nation as a category of historical analysis is not a natural given. It is a constructed space, shaped by social and ecological constraints, by political struggle and by its place within wider systems. Wales became a nation through its structural subordination and the cultural and political forms of resistance that emerged in response. In this sense, the Welsh experience helps to denaturalise the nation. It is a place where history's deep structures are laid bare and that peripheral societies are central to understanding how the modern world was made. To write the history of Wales, then, is not simply to recover a forgotten nation. It is to confront the uneven creation of the world-system itself.

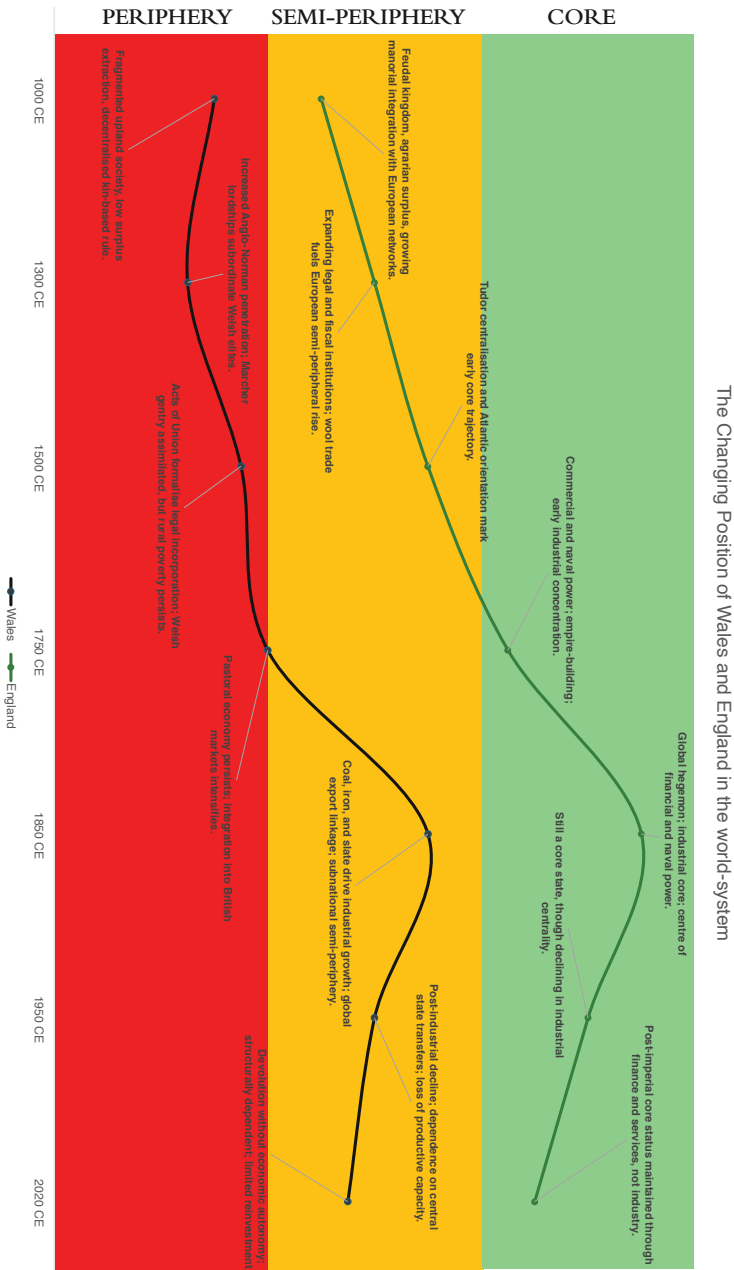


Figure 15: The changing position of Wales and England in the world-system (author's own).

5

THE PAST WE INHERIT, THE FUTURE WE BUILD

This book has examined four case studies to reveal something about the structure of capitalist modernity itself. Each occupies a distinct location within its respective state. Each has undergone incorporation on different terms. And each articulates a specific contradiction between its economic function, its political capacity and the institutional framework through which it has been governed. We have journeyed through the weaving contours of history – its ravines, peaks, blockages and contradictions – analysing the punctual points of history, but always with the *longue durée* in mind. This work has been undertaken with what Braudel (1996, p. 16) referred to as the core problem of historical inquiry:

Is it possible somehow to convey simultaneously both that conspicuous history which holds our attention by its continual and dramatic changes – and that other, submerged, history, almost silent and always discreet, virtually unsuspected either by its observers or its participants, which is little touched by the obstinate erosion of time?

To achieve this, this book has analysed the apparent contradiction of continuity and change, stability and flux which permeates our histories. Geologies, climates and soils – seemingly unchanging – have shaped our histories via the paths available to our forebears and the social milieus in which they lived.

What unites these cases is not a shared condition of marginality or failed nationhood. It is that they each make visible, in a different

way, how the world-system generates and reproduces spatial differentiation and that this exists even within the borders of core states. This unevenness is not incidental, but structural. The world-system does not just differentiate between north and south, between metropole and colony. It also differentiates on a sub-state level. It generates uneven development not only between states but within them, and this internal differentiation is managed, stabilised and often concealed by the political form of the state. The modern state does not eliminate uneven development but instead it contains and administers it, aiming to unify juridically what remains unequal economically.

Each of the regions studied here has experienced this dynamic in different ways. Wales was incorporated early and conclusively, absorbed into English political and legal institutions centuries before the emergence of a modern British state. Its resources and labour were vital to Britain's industrial expansion, yet it exercised little control over the conditions of that contribution. Even after devolution, it remains a polity without fiscal capacity and is structurally peripheral within a core state.

Catalonia, by contrast, has long been productive, urbanised and institutionally sophisticated. It has served as an industrial core within Spain. Its political demands – often framed in terms of cultural identity – should be understood as a reaction to an economic unevenness at the centre of the creation of the Spanish state; a contradiction whose echoes are heard from the depths of the past.

The Mezzogiorno represents another structural pattern of incorporation through conquest, followed by systematic underdevelopment. From the moment of unification, it was treated not as a partner in a national project, but as a space to be managed and administered from above. The Mezzogiorno was actively produced as a dependent region. Developmental interventions – whether under the banner of national unity or European cohesion – have served more often to preserve the region's dependent position than to transform it.

Padania, finally, presents a reverse configuration: a region of industrial strength, political self-assertion and fiscal surplus. It has benefitted from the structure of the Italian state, yet increasingly frames that structure as a burden. Its demands for fiscal autonomy and territorial reconfiguration are not rooted in cultural grievance or historical repression. They are demands from a regional bourgeoisie to retain control over the fruits of its own productivity. Its structural position is not one of exclusion but of dominance, and yet that dominance itself becomes a site of tension when subjected to redistribution.

What these cases show is that incorporation into the state does not eliminate unevenness but instead reshapes it. Each region occupies a different place within the political economy of its state, but all are shaped by the same structural logic of differentiated integration. The modern state is not a neutral arbiter of space, but a mechanism for managing uneven development. It absorbs surplus, redistributes investment, disciplines labour and constructs the illusion of unity over profoundly unequal terrain.

The key insight, then, is not that these regions were ‘never fully incorporated’, or that they somehow lie outside the nation-state. It is that they are incorporated on terms that reflect and reinforce their structural role within both the state formation and the wider world-system. Some serve as productive cores, while others are maintained as dependent regions. These are not failures of the nation-state but the conditions of its operation.

The unevenness that this book tracks is therefore not solely a symptom of poor governance, nor a hangover from pre-modernity. It is an enduring feature of how modern states are organised. The internal geographies of the state are sharply hierarchical. Roads, institutions, tax regimes and political influence are not distributed evenly. They follow capital, and they follow the strategic priorities of accumulation. When conflict emerges, when autonomy is demanded, when development is resisted, it often reflects a belated recognition of the asymmetrical nature of the national project.

This does not mean that regionalist or nationalist claims are always progressive. Nor does it mean that autonomy will necessarily redress structural inequality. The case of Padania shows clearly how dominant regions can mobilise for autonomy as a means of avoiding redistribution. The Mezzogiorno shows how dependence can become institutionalised. Catalonia and Wales, while vastly different, both reveal how autonomy can be granted in form while being denied in substance.

Yet the very fact that these movements recur – that regions continue to contest the terms of their incorporation – points to a deeper instability in the structure of the modern state. That structure, inherited from nineteenth-century territorial consolidation and shaped by twentieth-century capitalist expansion, is now under strain. The state can no longer easily contain its own spatial contradictions. Autonomy movements, fiscal revolts, infrastructural disparities and political fragmentation are expressions of a world-system that can no longer fully reproduce itself on the terms it once dictated.

What this book has shown is that the world-system does not simply act at the level of nation-states. It acts through them by producing internal divisions, assigning differentiated roles to regions and managing the tensions that follow. In this sense, Wales, Catalonia, the Mezzogiorno and Padania embody different structural positions that make the system work while also making them visible.

This book has not offered a single model of resistance, nor a roadmap to sovereignty. Its aim has been different: to clarify the structural conditions under which autonomy is made possible or foreclosed. Furthermore, autonomy in the world-system differs from autonomy within the state. Each place would still have to contend with the evolving logic of capital and strategic reorganisation within the world-system. As the world-system enters a new phase of crisis – ecological, financial, geopolitical – the spatial arrangements described here will come under renewed strain. Some regions will gain new leverage. Others will find themselves further subordinated. But the structural logic remains. Development will remain uneven, and autonomy will remain constrained by the world-system itself.

Understanding these dynamics requires more than economic indicators or institutional analysis. It requires a historical and structural view of space, one that understands disparate regions as constitutive elements in the organisation of the system itself. That has been the ambition of this book: to make those structures visible, and to understand their contradictions through the long history of the nations that reveal them.

While the contradictions themselves remain, they no longer appear accidental. They are shown to be embedded, enduring and reproduced. That is why the histories of these places matter, not just in and of themselves, but also for what they tell us about the world-system in which we exist. Understanding these conditions historically, structurally and critically is the first step toward thinking beyond them.

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Samuel Parry is a historian of political economy and world-systems analysis, specialising in *longue durée* approaches to regional development, state formation, and the structural history of stateless nations.

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