

Building Bridges between Dependency Theory and Neo-Gramscian Critical Theory: The Agency-Structure Relation as a Starting Point

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Abstract: Finding common ground between theories that have never or seldom spoken is a necessary first step to bridge-building, particularly concerning their foundational bases. This article proposes to develop such a footing for a dialogue between the Marxist version of Latin American Dependency Theory (MDT) and Robert Cox's neo-Gramscian Critical Theory (NCT). The on-to-methodological debate around the agency-structure relation offers a possible starting point for a discussion of (in)compatibilities, in particular by deciphering how each understands the relation; but also by asking whether they bring particular social ontologies that need to be addressed.

Keywords: agency-structure, Robert Cox, dependency, development and underdevelopment, hegemony, bridge-building.

Introduction

Although debates in Latin America around economic development and the need to overcome dependency had earlier roots, the 1950s and 60s sparked rich discussions that left their mark on the continent and beyond. Understanding the dialectical relation between development and underdevelopment within the marks of global capitalism was arguably the necessary first step to interpreting the differentiated process of capitalist development in Latin America. For this endeavour, theorists had to elaborate 'new analytical-explicative categories that would serve as a base, not for a new theory of development, but for a new theory of dependency' (Bambirra 2012: 38). Roughly seventy years later, however, we

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are still confronted with the need to overcome underdevelopment and dependency, albeit with new historical manifestations.

To offer a fresh perspective on the debates around dependency and world order, the objective here is to take a step towards the building of theoretical bridges between Marxist Dependency Theory (MDT) and neo-Gramscian Critical Theory (NCT). This proposition is premised on the hypothesis that, when combined, aspects of each will offer a richer theoretical and conceptual framework for research on underdevelopment and possibilities for overcoming it within the field of International Relations (IR). This is particularly evident for Robert Cox's NCT and his unequivocal proclivity towards the global disadvantaged. MDT offers NCT a framework for understanding and explaining deep structures that have sustained unequal global power relations. Bridge-building here will rely on contributions from Antonio Gramsci as a base for establishing the dialogue. MDT's founding theorists, notably Ruy Mauro Marini, Theotônio dos Santos, and Vânia Bambirra, were not neo-Gramscian; and although Cox¹ has been classified as such, he has insisted on not being boxed into any particular school of thought. Some important onto-epistemological elements of these two perspectives, however, find common, fertile ground in Gramscian theory.

Considering Gramsci's analytical separation of the three moments of force, i.e., the economic, the political, and the military, MDT and NCT both offer unique contributions that complement an Analysis of Situations. More specifically, MDT innovates in developing the economic moment, while NCT can further develop the political when combined with MDT. This is not to suggest that MDT has ignored the political sphere nor the agency developed within it. Rather, it has borrowed concepts from the wider Marxist research programme, much as this article proposes to do more straightforwardly.

There are different paths that bridge-building can take, from shared normative perspectives or objects of inquiry to broader meta-theoretical concerns. Insofar as a theory can serve two general purposes—to provide theoretical and ideological sustenance to a given order or to engage with possibilities of its transformation (Cox 1981, 1992b)—, MDT and NCT share the normative commitment to transforming global power relations. One could also focus on how they work the centre-periphery relation as an object of inquiry. Broader meta-theoretical concerns could span the meaning attributed to science, the nature of social ontology, the study of causality, or the agency-structure relation (see Wight and Joseph 2006 for more on philosophical inquiries). While most of these, in one way or another, figure into the construction of this article, more significant weight is given to the agency-structure relation, the reasons for which are clarified ahead.

The explanatory methodology chosen here is sustained by the underlying premise that the building of theoretical bridges has as a prerequisite the verification of ontological, epistemological and methodological compatibilities between the theories in question. More specifically, to question whether the stances of any two theories within the agency-structure debate are compatible. For, if one theory ascribes precedence to either structure or agency and the other does not, the substantive qualities of each will not harmonise, and so, will distort the elements beyond what they are understood to be. In other words, harmonisation of elements (concepts and ontologies) cannot transubstantiate what

one deems to be part of their core; and to deform analytical or substantive elements is to discard them and adopt new ones.

Although the meta-theoretical debate on compatibility merits attention in its own right, these particular issues stand out precisely because they have been emphasised by the theorists with whom I am engaging. Marini (2011) draws two epistemological delimitations to guide research on dependency, both common to Marxism. In the first, he points to the noncritical application of abstract concepts that neglect the concrete—against dogmatism and what today has come to be called eurocentrism. The second refers to conceptual adulteration or the adaptation of a foreign concept to a theoretical framework with which it is incompatible. I would suggest that this might follow from a failure to engage in the endeavour to verify the cognitive compatibility between the concept and the theory. The two common errors, therefore, point to a need to verify compatibilities.

There were few references found to the dependency literature in Cox's consulted works. Mirroring the theoretical conflation found in a great part of the North's critiques of dependency theory, Cox does not distinguish between the different approaches, notwithstanding their onto-epistemological and often irreconcilable theoretical differences, all the while presenting a cognitive imperative:

Dependency theories [...] originating in Latin America [...] put the whole weight on the world system, regarding states and national societies as merely playing out roles assigned to them by their place in the system. These theories underestimated the indigenous capacity to bring about change in relative power and in forms of society. Here I am suggesting that the relative weight of internal and external factors, and the nature of these factors, is not constant but is conditioned by the prevailing structure of world order (Cox 1987: 108-109).

The conflated character of this affirmation makes it difficult to counter — for to disagree outright would require speaking of all different variants of Latin American dependency theory. By bracketing this initial conflation, we can look beyond this apparent incongruence to interrogate that which is fundamental to Cox's critique against the works of Bambera, dos Santos, and Marini.

As dos Santos argued, dependency can only be understood *in relation to* internal structures. Marini (2013: 73) stated outright how 'no explanation about a political phenomenon can be good if it is reduced to only one of its elements, and it is decidedly bad if it brings foremost an external conditioning factor.' Following Ouriques (2013), I ascertain that the more analytical works of these authors corroborate the decisive weight put on internal (political and economic) forces in their relation to both internal/external structures and international forces. Before providing an analysis of NCT and MDT within the parameters of the stated objective, the first sections will present the referenced agency-structure debate and its importance for bridge-building. In addition to the authors mentioned above, others who have spoken directly to their works or agency-structure will be brought

in. Having contextualised these contributions within the particular cognitive elements, the two approaches will then be confronted in their onto-methodological and theoretical elements to present analytical complementarities.

Meta-theory and bridge-building: why cognition matters

The basic premise grounding the discussion in this article is that (1) a practical social theory, to have internal coherence, needs to be harmonious with its (2) explanatory methodology and (3) social ontology. What we hold, in the particular case of IR, the international system and its components to be (the social ontology in question) will necessarily affect how we study them (methodology). And this, in turn, also needs to be established before we begin to investigate the problem at hand. While methodology does not explain anything by itself, it does play a regulatory role in theory development, nudging the theorist in certain directions and away from others (Archer 1995: 2-6).

Within this tripartite connection, for consistency to be reached, however, regulation cannot flow unidirectionally from ontological concerns towards theorising. That which is held to be true also needs to be checked by what is found to be true in social research (compare with Cox's (1981) delimitation of critical theory). Consistency requires, therefore, a back-and-forth and ongoing revision. Far from guaranteeing an adequate explanation of social reality, consistency is but a pre-condition for scientific research (Archer 1995: 17).

The 'vexatious fact' within social theory has been whether outcomes are best explained by having the individual (agency) or society (structure) as their root cause. This is an ontological issue insofar as it posits, at least implicitly, an understanding of the nature of agency and structure as well as of their relationship. It entails what one holds not only agency and structure to be, but also their causal relation (Archer 1995). The question of causation may be termed as a question of precedence. For, whichever one precedes the other will be causing or forming it. When asking this question, three possible answers are apparent (Wendt 1987).

The first two afford precedence to either. If one holds that structures are created and shaped by agents according to their will and decisions, then an *individualist* or *agential* approach to the problem is verified. Agency would have ontological precedence and would mould, but not be moulded by, structures. If structures are held to have ontological precedence, meaning they could explain the nature of individuals and outcomes, then a *structuralist* perspective would be held.

A third position on the precedence question is that neither agency nor structure holds it, in which case their relationship would be of mutual causation. Some IR theorists (see Wendt 1987; Reus-Smit and Snidal 2008) defend that this approach can be summed up within *structurationism*. However, a more thorough review of the literature (Archer 1995; Bieler and Morton 2001; Wight 2006) suggests that Wendt's three-part categorisation is misleading because it conflates the negation of ontological precedence with a single approach (Archer 1995)—that of Giddens (2009) and his structuration theory (elisionism), when there are, in fact, others (emergentism).

More than unveiling a theory's onto-methodology in the agency-structure debate, it is also important to verify the tripartite connection. Since *disconnections* between the different elements become manifest in social theorising/research, problems arise.

If tripartite connections are essential for internal coherence in theory building, it follows that the same should hold for theoretical bridge-building. In this same reasoning, Checkel (2012: 223) warns: '[T]his bracketing of meta-theory has led bridge builders to neglect foundational issues. Are there philosophical limits to the exercise?' From what we have seen so far, it seems there are. I understand the foundational issues that Checkel refers to as encompassing the need to verify internal consistency in bridge-building, particularly as it regards the adopted agency-structure onto-methodology.

The bridge being projected here thus seeks to analyse what MDT and TCN understand the social ontology of the world system to be, how the relationship between agency and structure is grasped in this ontology, and how the explanatory methodology employed in the two theories treats the agency-structure relation within an analysis of global power relations.

Bringing together an ontological walkway for our rope bridge

A sturdy bridge warrants careful attention to its components and how they are brought together. Accordingly, this section will highlight important ontological components of each theory; specifically, the preference for emergentism; the ontology of the development-underdevelopment relation; and the issue of levels of structure.

As stated above, although both elisionism and emergentism reject epiphenomenalism as an interpretation of the agency-structure problem, how they define the relationship is different.

While elisionism argues that the two are internally related, that agency and structure must be considered together, emergentism defends the notion of the *analytical separability* of the two. Giddens (2009), arguing for inseparability, develops the notion of duality of structure. The intention is, in part, to break with the notion of dualism (separability) and to defend that a structure is both a medium and an end. Although agency and structure would be mutually constitutive, Archer (1995: 65-6) argues that 'this methodological notion of trying to peer at the two simultaneously' should be resisted, 'for the basic reason that they are neither co-extensive nor co-variant' through time. Therefore, *analytical* separation allows us to better understand how structures endure longer than individuals and how variance in one does not coincide temporally with variance in the other. She argues that *factoring in time* would lead one to recognise that agency and structure work in different time intervals (see Cox 1992b for a similar affirmation). It is not enough to acknowledge the historicity of agency and structure, that is, that they vary in time; this variance also needs to be worked *into* the analysis.

More than serve as a platform from which to build up MDT and NCT, the purpose of bringing emergentism into this discussion is to set a parameter for establishing compatibility between the two theories. As mentioned above, a practical theory, to have internal

consistency and strength, must hold a firm tripartite link with its methodology and ontology. When speaking of building bridges between theories, the same should hold.

Structural levels of analysis

In order to inquire about the possibilities of action within a given structure, it is necessary to understand that structures penetrate social life to varying degrees and go through different processes of reification. A given structure will appear to be natural when people do not recognise it as a historical construct; that is, as having been *made*. Therefore, one can only speak of a *given* structure when referring to a particular moment in time, but it is imperative to grasp the structure's non-static character.

Structures present different layers, some more deeply embedded than others, as a reflection of the time period each structure presents itself as objective, as well as the importance it holds for the deeper structure as a whole. Time as an analytical factor carries its weight by highlighting the degree of maturity of a given structural layer and the subsequent penetration of its rootedness in social life.

Bieler and Morton (2001) present three basic layers of structure from their reading of Cox. The macrostructure is the most deeply embedded and can be thought of as having moulded society for a longer period. Mesostructures, on the other hand, mould society for decades and are not as deeply reified. They can be recognised as forms or phases of macrostructures. Microstructures, on the other hand, refer to conjunctural movements, or the day-to-day of societies and the globe. Capitalism, understood to be a macrostructure, "in each of its different historical forms, has also been a distinct system of values, patterns of consumption, social structure, and form of state" (Cox 1992b: 527). These distinct historical forms are mesostructures of capitalism.

The different mesostructures may overlap one another and, while there might be transformation within that particular level of analysis, movement towards a new mesostructure (e.g. the Bretton Woods order to a post-Bretton Woods system) may work to reinforce system maintenance within the deeper macrostructure. To gaze at agency and its effect on both change and continuity, one needs to apprehend its relation to structure—in the multifaceted understanding of its different levels. How does agency effect change and continuity in the mesostructures? How does this interaction affect what happens in the macrostructure? And what is happening in the microstructures and how does this relate to the interactions in and between the meso- and macrostructures?

Development versus underdevelopment? More onto- and some methodological beams for the bridge

In their delimitation of what a model of the world system should look like, Cox and Jacobson (1977) argue that there is a need to go beyond the 'simple dichotomies' of East-West and North-South (and arguably centre-periphery). Production relations can be taken as a starting point, but '[t]he internationalizing of production is the underlying historical

process that has linked these segments of the world together and determined their relationships within the whole system' (Cox and Jacobson 1977: 359). They go on to speak of the movement of physical production to peripheral areas and the control mechanisms of the centre (compare with Marini 1973 for a similar exposition that predated theirs; and Marini 2013, especially Parts I and II, to compare what he came to call 'imperialism's integrating tendency' with Cox's 'internationalising of production' above).

To question how MDT comprehends the agency-'multiple structures' problem, in the direction of moving beyond 'simple dichotomies,' a first step might be to consider perhaps its most fundamental onto-methodological premise: the development-underdevelopment dualism as foundational to world capitalism.

Among the different perspectives around underdevelopment, a widely held approach in Western academia presented it as a phase prior to development, in a teleological vision of the problem set in stages, as that defended by Rostow. A second perspective, outlined by Frank (1970) and substantiating MDT, countered that today's developed countries were never *underdeveloped*, but rather *undeveloped*. Rostow's stages, in this view, misrepresented reality in its comparison between centre countries' previous status to the current status of the periphery. For MDT, development occurs *pari passu* with underdevelopment. Taken as two complementary and necessary processes within global capitalist development, the cost of capitalist centre development is understood to be the periphery's underdevelopment; or, the centre develops precisely because the periphery *underdevelops*, and vice-versa. Therefore, there is no possibility of breaking with underdevelopment without a concomitant break with capitalism (unless the dependent country is able to join the centre states in their imperialist practices), given that the factor which allows for the accumulation of capital and its subsequent reproduction is the draining of surplus from a population; which is, in turn, what sustains capitalist development (dos Santos 1970, 2011; Frank 1970).

Contrary to critics who insist on depicting underdevelopment as a lack of development to disparage dependency literature, Marini's (1977, 2011, 2013) and dos Santos' (1970, 2011) works are exemplary in that they demonstrate how Brazil *underdevelops* via industrialisation; and how this industrialisation is key for Brazil to achieve sub-imperialism status under the military dictatorship (Luce 2011, 2019; Marini 1977).

The ontological perspective of underdevelopment as part and parcel of global capitalist development is the premise that underlies all theorisation and analyses by Marxist *dependentistas*. While many have drawn precipitated conclusions of this ontology as structuralist² (as apparently not allowing room for agency or change), it is best apprehended within the multifaceted structure paradigm brought by Bieler and Morton (2001). The development-underdevelopment dualism speaks to the capitalist system as a macrostructure, which endures, facilitates, constricts, and moulds not only agency but also other structures for a longer period; and which has therefore also reached one of the deepest levels of reification and embeddedness.

In this sense, underdevelopment can be characterised by its dynamic with foreign capital. The primary role of foreign capital in the periphery is to make—by super-exploiting

its labour-power and resources—more capital and ship it back out,³ allowing for the continuity of capitalism as a world system. Additionally, underdevelopment is distinguished by the basic drive behind its economic dynamicity and direction: exogenous command and demand (Marini 2013).

Considering time as an important analytical factor for the agency-structure relation, it is important to see how it enters MDT's explanatory methodology. In line with Gramsci (2000b), who holds that one must differentiate conjunctural movements from organic ones and their relation in the study of structure, Carcanholo (2013) points to the analytical separability of dependency's conjunctural and structural (organic, for Gramsci) constraints in MDT, imperative for the analysis of the parameters of action. In contrast to the greater rigidity of the structural/organic constraints, the conjunctural constraints—the situation of the world economy and the international credit market—influence the room of manoeuvre open to dependent countries, albeit for a reduced span of time. Marini explains:

[I]n contrast with what happens in capitalist countries in the core, where economic activity is *subordinate to the relation between the internal rates of surplus-value and investment*, the basic economic mechanism in dependent countries is the *import-export relation*. The surplus-value obtained within the dependent economy is realised in the sphere of the foreign market through export and its revenues are applied, for the most part, to the imports. In other words, the surplus that is *investable*, therefore, suffers the *direct action of factors exogenous to the national economy* (Marini 2013: 50-1, emphasis added).

In other words, while the dynamicity of centre economies can be self-sustaining, that of peripheral economies is largely rooted in the external sector. The conjunctural moment may, therefore, either widen or narrow the parameters of action for dependent countries as a reflection of the growth of the world economy (e.g., through increased demand for exports) or of the credit market (increased liquidity) (dos Santos 1970; Carcanholo 2013).

Dependency's structural constraints sustain variance in their continuity, but due to their endurance, they are understood as more rigid than conjunctural constraints. The relation between both needs to be considered in the changing parameters of action through time, but not without apprehending how that society's particular characteristics have re-defined the conditioning situation.

Similarities between Cox's (1987: 230-4) depiction of the strong structural constraints on peripheral countries and those in MDT analyses are worth noting. According to Cox,

In a number of countries of the Third World, forms of state power exist, even repressive coercive power, that are not sustained in any coherent way by internal social forces and are of only limited effectiveness in controlling external economic and political influence. [...] The protostate can extract tribute but lacks the capability or incentive to reshape society, and society is neither strong enough nor

coherent enough either to manage itself or to fashion a state in its own image. [...] The protostate is symptomatic of an impasse in the relationship of the state to society (Cox 1987: 230-1).

He goes on to exemplify a form of state, common to dependent economies, which seeks to improve their structurally diminished agency: the neomercantilist developmentalist state. In parallel with Marini's (2013) above-cited formulation, Cox emphasises not only the lack of an internal dynamic force and the role of surplus labour, but also the problematic dependence on external capital and technology for economic development. While this particular form of state attempts to take some control over its resources and to maximise its profits, its influence and control over development objectives are secondary to that of international capital. Where MDT goes further is in demonstrating, beyond a dependence on capital, technology, and external demand, the effects of the transfer of value and the origin and role of super-exploitation on labour and dependent capitalist development.

Cox (1987: 232) arrives at the understanding that the dependent proto-state in question, the neomercantilist developmentalist form of state, does not attempt to 'break [...] with foreign economic dependency.' In dos Santos' (2011: 362-3) conception, dependent societies have two alternatives: to choose among the options given by the conditioning situation of dependency; or to (seek to) change, qualitatively, the situation of dependency itself. In this direction, Marini's (2013) more analytical works illustrate how and why the Brazilian capitalist class abandons the objective of autonomous development—of 'breaking with foreign economic dependency,' i.e., abandons the alternative of qualitative change, from dependency to autonomous development.

Although the global system will influence its parts, that is, determine them, this determinism cannot be understood as functioning in any mechanical sense (Bambirra 2012). Furthering this idea, dos Santos (2011: 356) holds that the *international situation* (of capitalist development) and its effects on dependent countries are a general condition and not an all-powerful autonomous force. How this general condition forces itself onto the national reality is determined by its internal components.

Dependency is, in this sense, a situation that conditions the (under)development of peripheral societies (dos Santos 2011). The relation between the international dependency structure and the internal structure of dependent societies undergoes a process of structural redefinition, in which the former conditions the latter, which, in turn, 'redefines dependency in a manner functional to the structural possibilities of different national economies' (dos Santos 2011: 364).

In rejecting mechanical determinism (see Williams 2005 for a discussion on the meanings attributed to the notion of determinism), MDT works with a social ontology that, based on the conditioning of parameters, presents a clear perspective on the agency-structure debate. According to Bambirra, the conditioning of parameters entails:

[A] series of contradictions in which interactions, shocks and struggles offer the *alternatives* or *historical possibilities for action* and

functioning to the different social classes and sectors which are *formed within these general parameters*, that is, *in which the options* for economic and social policies become possible (Bambirra 2012: 41, emphasis added).

In line with the emergentist and the neo-Gramscian perspective (see Bieler and Morton 2001; Wight and Joseph 2005), agents are understood as being moulded by and having their possibilities of action framed within structures. As in Gramsci, and in light of how dependency is understood, the economic moment sets certain boundaries for political action.

Interestingly, the manner Marini apprehends dependency brings in an understanding of the different levels of structure, as presented by Bieler and Morton's (2001) reading of NCT. Dependency is understood as '[a] relation of subordination among formally independent nations, in which the relations of production of subordinate nations are *modified or recreated* in order to assure the *expanded reproduction of dependency*' (Marini 2011: 134-5, emphasis added). Tied more closely to the development/underdevelopment dualism, this conceptualisation makes room for discussing what would transformation (modification) and maintenance (recreation) cycles be within the mesostructural levels, necessary for maintenance within the macrostructure of dependency and global capitalism. In other words, underlying this perspective is the argument that change in the mesostructures does not necessarily lead to change in the macrostructure, but may rather be functional to its continuity. In so doing, it offers a point of critique to Cox's (1981) epistemological (perhaps) overemphasis on change. To understand possibilities for change, MDT seems to imply that we must look at the dialectic between maintenance and change *through* the meso-macrostructure relation.

Cox presents a certain tension in his apprehension of the micro-meso-macro relation throughout his works. This is left somewhat implicit in his seminal work (see Cox 1981) through the counter-hegemonic aspirations as possible futures; but worked out more explicitly in earlier work (see Cox 1979), where he presents cleavages within historical materialism regarding the analytical relations between productive forces vs relations of production and modes of production vs social formations. Here, Cox confronts problems of determinism-voluntarism (structure vs agency) and levels of structure (meso/macro vs micro), respectively. While at first he criticises the relative emphasis given to one or the other, ignoring the possibility of a dialectical relationship between each, he evaluates positively the way another theorist (Hartmut Elsenhans) 'arrives at a balance between production relations and productive forces rather than a subordination of one to the other' (Cox 1979: 408).

Having this anti-reductionist tenet in mind, let us turn to the main conceptual and theoretical contributions of NCT and MDT.

A look at categories: where Cox meets Gramsci

Cox's (1981) method of historical structures can be perceived as a further elaboration of Marx's base-superstructure model⁴ in which the multilinear causal relationship among its elements is emphasised along Gramscian lines. A *historical structure* is a combination, at any given historical moment, of the material capabilities, ideas, and institutions present, in which each element influences the other two, but with varied intensity in different moments.

Instead of explaining the categories outright, a step more conducive to the purposes of this study would be to consider them in light of Gramsci's (2000b) moments of relations of forces. In Notebook XIII, Gramsci (2000b) distinguishes three different moments within the more general category of relations of forces, all of which are necessary for an Analysis of Situations.

The first moment, the *relations of economic forces*, refers to the more objective material forces of production, independent of the will of people (Gramsci 2000b). The *material capabilities* category, in turn, refers to technological and organisational capability, in what Cox (1981) considers to be the category's dynamic form, as well as natural resources susceptible to transformation, stocks of equipment, and wealth, characterised as its accumulated form. While both have a relation to what in Marxism is understood as structure or base, Gramsci (2000b) demarcates the economic moment as imperative in delimiting the viability of current ideologies, that is, whether '*necessary and sufficient conditions*' are present within society for its transformation.

The relations of political forces represent the second moment and arena in which the level of organisation, homogeneity and self-awareness among different social groups should be evaluated. This level can be subcategorised into three different levels or degrees of collective political consciousness. The (1) economic-corporate moment is defined as the moment in which a professional group consciously acquires unity and homogeneity, and with it the understanding of the need to organise. When this collective consciousness extends into the (2) solidarity moment, all members of the social class in question perceive a need to develop solidarity among interests, although this is circumscribed to the economic area. When corporate interests of the economic type are overcome and the interests of subordinate social groups are incorporated by the dominant group, the entrance into the political sphere ushers in the (3) hegemonic moment (Gramsci 2000b, 2004).

The analytical move from the first to the second moment of relations of forces (arguably) represents a step from the base/structure to the level of complex superstructures. Moreover, it is in the second moment, the political one, in which Cox's (1981) categories of ideas and institutions are embraced. The first of the two, i.e., *ideas*, can be subdivided into two subcategories. *Intersubjective meanings* are widely shared notions about the nature of social relations that tend to last for an indeterminate period and are expressed in habits and expectations about the behaviour of others. *Collective images*, on the other hand, are circumscribed to specific social groups and how each sees the nature and legitimacy of the prevalent political order, having, thus, a more limited scope.

The category of *institutions* or institutionalisation expresses the tendency of a particular order to reinforce itself, presenting itself as the reflection of the prevalent power relations. In this sense, an institution tends to be the expression of a dominant collective image, although it might also become a battleground for competing collective images (Cox 1981).

As expressions of complex superstructures, these two categories of force (ideas and institutions) function within Gramsci's (2000b) relations of political forces,⁵ in conjunction with the development of collective consciousness and the resultant organisation. What is not represented in Cox's triangle of categories of force, more specifically in what is here being simplified as the superstructural level, is the distinction between Gramsci's different levels of consciousness, as collective images could figure into any of the three levels (economic-corporate, solidarity, and hegemonic). The development of different levels of collective consciousness could be considered, analytically, different degrees in the development of collective images. This might be especially interesting as an explanatory tool when analysing the development of agency, especially if speaking about purposeful agency (see Wight and Joseph 2006 for insights on agency in a compatible perspective within critical realism). On the other hand, the subcategory of intersubjective meanings is not brought (in any obvious manner) into Gramsci's (2000b) political moment of relations of force and would help explain more deeply embedded social structures, potentially applicable for questioning unconscious motivations and behaviours, current paths that are largely left unremarked. In this sense, each could complement the other.

The third moment, decisive for outcomes, is the relations of military forces. This moment is (also arguably) contemplated in the category of material capabilities, as it includes both the accumulated form of military capacity (weapons and military industry) as well as its dynamic form in its organisational aspect. It is worth noting, however, that while Gramsci (2000b) thought it necessary to have the military moment categorised separately, Cox (1981) joined economic and military forces within the same category of material capabilities. Gramsci's distinction may be due to the decisive role that relations of military force might play in concrete opportunities. The analytical implications of having these elements either separated or joined in a single category might also be a point that merits discussion.

While Cox's categories of force are understood as developing a multilinear relationship with each other, Gramsci's relations of force express the importance of all three structural levels (base and complex superstructures) in any Analysis of Situations, albeit with different parts to play in their relation. Although the latter is also meant to express a multilinear causal relation, it is important to highlight the distinction that Gramsci (2000b) drew in attributing to the economic moment the condition of setting parameters for action, thus limiting the possibilities for the political moment. Moreover, the decisive character recognised in the military moment is also noteworthy.⁶ It is of utmost importance to note that these differentiations are not given within Cox's historical structures, a point that will reappear shortly.

Levels of structure and interaction

While the previous subsection detailed the base-superstructure elements within Gramscian and neo-Gramscian thought, this one seeks to detail the different levels in which these specific elements and agency develop.

Both Cox (1981) and Gramsci (2000b) distinguish three levels in which the categories of force or relations of forces, respectively, should be analysed; that is, levels in which activities are undertaken.

Each sphere within NCT influences and is influenced by the other two. The sphere of *social relations of production*⁷ contemplates the organisation of production, given that they are engendered within the productive process. *Forms of state* refer to types of state-civil society complexes. *World orders* are particular configurations of forces that define the problematic of peace and war among states. Change at one level might bring about change in another, and the importance of each level within the configuration of that historical structure differs according to historical moments (Cox 1981).

The multilinear causal relation between Cox's categories of force also characterises the relations between the spheres of activity of his historical structures method. Given the apparent incongruence between how Cox and Gramsci define the relation between their different categories, some commentary is necessary. Cox's main concern is to develop a non-reductionist framework, which, as noted above, has been argued as leading to a Weberian pluralism (Burnham 1991). This is a potential problem for this instance of bridge-building because both Gramsci and MDT do afford a centrality to the economic sphere as the moment that delimits concrete possibilities for action. While Gramsci pushes multilinearity as an onto-methodological principle, he also affords—even if not as decisively, according to Germain and Kenny (1998)—a special place for the economic level of analysis.

Bieler and Morton (2001) provide a reading of Cox distinct from Burnham's in which they argue that the sphere of social relations of production *is* afforded centrality in Cox's works. By defining production broadly, beyond that of physical goods for consumption, and including 'production and reproduction of knowledge and of social relations, morals, and institutions that are prerequisites to the production of physical goods,' Cox arrives at an understanding, in later works, that avoids economic reductionism (Bieler and Morton 2001: 24). What this makes clear is that multilinearity, in Cox's work, does not need to negate the centrality of social relations of production,⁸ which is done by recognising how economic elements are intertwined with political and ideational ones.

The primacy conceded to the social relations of production is in line with Gramscian thought, all the while avoiding the trap of economism (Bieler and Morton 2001). As explained above, the relations of economic forces, based on the degree to which the material forces of production have developed, delimit the scope of possibilities for transformation; that is, they will establish what the necessary and sufficient conditions for transformation shall be. In this sense, Gramsci (2000b) is seen to place a stronger emphasis on the economic aspect of the social relations of production, but without reducing outcomes and explanations to it.

Concept of Hegemony in Gramsci and Cox

Central to Gramscian theorisation, the concept of hegemony characterises the conformation of unity among different classes and class fractions under the leadership of one class. The level of collective consciousness is raised to a degree in which subordinate groups not only perceive the leadership of the dominant group as representing the general interest of society but also have at least part of their own interests met through such leadership. In this sense, hegemony represents a balance between consensus and dominance. *Consensus* among the different social groups is the support for the leadership and dominance of a particular group and is an attribute of civil society. *Dominance* is the complementary and occasional use of force in distinctive situations by political society (the state) to guarantee hegemonic cohesion (Cox 1983; Gramsci 2000a, 2000b).

This unity is referred to as a historic bloc and represents the conjunction of structure and superstructure (Cox 1983; Gramsci 2000a, 2000b), leading Cox (1981) to claim that a harmonisation among his three categories of force is an expression of hegemony. Applying the concept to international relations, possibly his greatest contribution, Cox explains how:

[T]o become hegemonic, a state would have to found and protect a world order which was universal in conception, *i.e.*, not an order in which one state directly exploits others but an order which most other states (or at least those within reach of the hegemony) could find compatible with their interests (Cox 1983: 171).

Such an order could not be conceived merely in statist terms. An international historic bloc would be understood as a conjunction of forces from civil society *and* states. From this, one can gather a better understanding of what is meant by world order, as defined above, *i.e.*, as a particular configuration of forces that define the problematic of peace and war:

The hegemonic concept of world order is founded not only upon the regulation of inter-state conflict but also upon a globally-conceived civil society, *i.e.*, a mode of production of global extent which brings about links among social classes of the countries encompassed by it (Cox 1983: 171).

At the international level, hegemony is a world order that surpasses the political structure of states, encompassing the world economy and its dominant mode of production, which not only penetrates all states but also intertwines itself with subordinate modes of production. World hegemony is, therefore, also a complex of international social relations, as it traces relations among the different social classes of all countries. From this, it follows that a hegemonic world order necessarily comprises a configuration of social, economic, and political institutions (Cox 1983).

Marxist *dependentistas* converse: foundational categories in the tripartite link

MDT complements the theory of imperialism in that it looks at imperialism from the perspective of the periphery (dos Santos 2011: 357-9). In this sense, the Marxist *dependentista* perspective seeks to comprehend the specificities presented within dependent capitalism. Having discussed the *dependentista* onto-methodology, a presentation of the categories within MDT as a practical theory will close the tripartite loop.

Some have perceived, within the development/underdevelopment dualism, the transfer of value or surplus⁹ as one of the key features of imperialism (Leite 2015). This is premised on the understanding that centre capitalist economies are unable to absorb the ever-increasing scale of surplus capital created and must export part of it to the periphery for it to be realised. The periphery's counterpart to the capital (and production) it imports is the transfer of surplus created internally back to the centre. This transfer of value—a systemic imperative for the expanded reproduction of capital—can be divided into two main processes, represented by unequal trade and remittance of surplus. The first works within the commercial sphere, while the latter functions as remuneration of capital.

In the debate around unequal trade, Marini (2011) offers his contributions to contemplate the reasons behind the increasing chasm between the offer of primary goods and their decreasing prices relative to that of industrial goods. He discards simplistic explanations about this phenomenon extrapolated from supply and demand (that falling prices would be due to increased supply) or purely political and military causes (that great powers would be forcing the situation). According to Marini, there would have been a misordering of factors in either explanation:

It is not because abuses were committed against non-industrial nations that they are economically weak, but rather it is because they are weak that they were abused. It is also not because they produced beyond demand that their commercial position deteriorated, but it was the commercial deterioration that led them to produce on a greater scale (Marini 2011: 143).

In this reading, economic weakness and the deterioration of the terms of trade are phenomena linked to how prices are set and value is produced.

It would be a useful exercise to peruse the category of unequal trade from the perspective of NCT. Borrowing Bieler and Morton's (2001: 20) paraphrasing of Gramsci, we can apprehend the structures behind unequal trade as historically subjective, 'as having become accepted as "universal" subjective definitions, or intersubjective understandings, of the social world while retaining a "humanly objective" sense'. Putting the problem in Coxian terms, there would be an intersubjective macrostructure behind how trade is organised (and prices set) that sustains not only unequal trade but underdevelopment more generally.

The intersubjective meaning that MDT discusses (albeit without using this Coxian category) is the unacknowledged understanding that exchange value should be the base for international trade relations. Although Marini (2011) does not further elaborate on his reasoning, he sheds light on the humanly objective character that this historically subjective understanding has acquired. In this excerpt, Marini criticises arguments in favour of negotiating or improving the terms of trade (a *problem-solving* argument, within the Coxian lexicon) over the need to overhaul its foundations (a *critical theory* perspective, with a focus on transformation):

To deny seeing things this way is to mystify the international capitalist economy, to believe that this economy could be different from what it actually is. This would lead to a vindication of equal trade relations among nations when the objective should be to abolish international economic relations based on exchange value (Marini 2011: 143).

To work towards an improvement of the terms of trade—that is, to make trade *more* equal within the given framework—would leave the underlying problem unaddressed. The *disorganising* principle behind unequal trade is that prices do not reflect value, understood as being determined by the amount of labour put into the production of a good. Capitalism rewards greater capital intensity in production, creating a vicious cycle in which societies with less capital-intensive production structures increasingly have to work harder only to afford less. Within the rejected problem-solving argument, the mechanisms that transfer value in unequal trade through differences in productivity would remain unaffected (see Carcanholo 2013 and Marini 2011 for the mechanisms functioning within unequal trade).

The other form of transfer of value, the remittance of surplus, is much simpler to grasp. It refers to the remuneration of capital, including remittances of profits, dividends, royalties, and interest payments (Carcanholo 2013). The weight of each in the balance of payments of underdeveloped countries varies in time and space—through the different phases of capitalism and dependent capitalism—, with changes in the relative importance of foreign direct investments, portfolio investments, and the role of international loans in different periods (see Bambirra 2012 and Marini 2013 for historical examples). This illustrates another type of *mystification*, as Marini put it, of the reified capitalist structures and their functioning, which too often are left unquestioned and could be contrasted with the *actual* role they play in these societies. Once again, by inspecting the deeply embedded intersubjectivity of capitalist meso and macrostructures, one could better grasp these contributions.

These two types of transfer of value have a debilitating effect on dependent capitalism. In transferring significant portions of the surplus-value produced internally, these capitalist economies cannot reproduce capital—that is, they cannot initiate new cycles of reproduction—without succumbing to one of two (or a combination of) historically given possibilities. The first would be to cease the transfer of value so that the capital that would

otherwise be transferred could, instead, be invested internally (partly attempted with capital controls up until the 1964 military coup). The second (and chosen) path would be to extract surplus-value from domestic labour-power in a qualitatively different process Marini (2011) has called super-exploitation.

Exploitation is understood to signify the excess labour-power employed by workers. This conceptualisation is based on the understanding that the value of a person's labour-power is equivalent to the needs of his or her reproduction. In other words, the number of hours needed to produce what is socially deemed necessary for an average person's livelihood (understood as beyond mere survival) is equivalent to the value of that person's labour. In capitalism, however, a worker needs to produce the value necessary for his or her reproduction *in addition to* something extra (surplus-value) that goes towards the reproduction of capital. The sustainability of capitalism, thus, requires workers to labour above their consumption needs for there to be profit to feed the continuity of the process.

Super-exploitation of labour-power goes beyond a mere increase in the degree of exploitation. Rather, it is understood as a requirement that people work up to a limit that is detrimental to their mental and physical health *and* without receiving the minimum compensation that is socially necessary for their reproduction. This translates into wages that cannot pay for adequate and safe housing; regular and sufficiently nutritious meals; access to adequate education, culture, and health care; and accompanies poor working conditions. The category of super-exploitation thus conveys the surpassing of a critical level that should be differentiated from the varying degrees of exploitation that occurs in the centre (for more on the specific mechanisms, see Carcanholo 2013 and Marini 2011).

Although Cox might not have been familiar with the concept of super-exploitation, the condition of the periphery's working class (as well as the peripheralisation of the core) was central to his thinking (see Cox 1987, 1992b), thus suggesting space for convergence.

Bridge-building: remarks on advancing theorisation through dialogue

There is no reason to state that NCT, as put forth by Cox, could not embrace the Marxist *dependentista* ontology of the world system, given that he does not develop a proposal of his own in this regard. This is not to say that other competing social ontologies of the international capitalist system could not be embraced. However, given Cox's stated interest in further understanding the complexities of 'oversimplified dichotomies' in global power relations, MDT provides NCT with a robust proposal for understanding and explaining not only the periphery but the global sphere.

The two theories also present a compatible stance on the agency-structure debate, considering mainly the contributions put forth by Bambirra and dos Santos, and the analyses developed in Marini's works (2013) when confronted with Bieler and Morton's and Cox's contributions. Underlying both theories is the perspective that, while structure moulds and constrains agency, agents have the ability to effect change through their decisions within a specific parameter of action, and even try to defy those parameters by questioning the system itself. The complexity of structures includes different levels (micro

through macro) and encompass different spheres (economic, political, military). And while agency in both approaches functions in the conjunctural (micro)level, this agency also moulds the meso and macro levels.

In perusing peripheral agency, Cox (1987) addresses the structural difficulties faced by peripheral societies in creating historic blocs, in building widespread consensus among the various and diverse social forces under the direction of a dominant social group. While one might apprehend the dependency structure as constraining the formation of a broad national consensus, we can also discern its generative (Wendt 1987) or emergent (Archer 1995; Wight and Joseph 2010) characteristic as favouring the development of Caesarism, a phenomenon in which a catastrophic socio-political disequilibrium between antagonistic forces finds its arbiter in a popular personality (Cox 1987, Gramsci 200b). Dos Santos might phrase this process in terms of the dependency's internal redefinition, emphasising the role of internal structures and configurations over mechanical determinism.

Paralleling one of Cox's (1992a: 513) critiques of world-systems theory, specifically that it explains how but not why the system at hand developed so, one can argue that the category *material capabilities* is equally problematic. Since Cox's method of historical structures provides no explanation beyond historical contingency as to why some states have greater material capabilities, why some are dominant and others dependent, MDT offers its own categories and perspectives. Having thoroughly developed the political aspect of social relations, NCT seems to have neglected *historically contingent* considerations around economic-level constraints, well-illustrated by Marxian laws and categories. Interestingly, MDT seems to be more in line with Gramsci's thought in this respect, as it has a better grasp of the global relations of economic forces than NCT—Gramsci's first moment that speaks to the *necessary and sufficient conditions* for transformation. In this manner, the relation *between* the different moments, as delimited in Gramsci's Analysis of Situations, is better apprehended by MDT than the multicausal relation within Cox's method of historical structures. We can therefore ask: what are the historically given constraints that economic structures place on agency? To grasp the laws of capitalism as a global macrostructure—without losing sight of the need to maintain the analytical balance with the microlevel—, and specifically those around dependency and underdevelopment, is a necessary step to apprehending how we have arrived where we are and the real possibilities for change.

Promising areas for future work

Although the focus here has been on how the *dependentista* framework could enrich NCT, there are also ways in which NCT might contribute to MDT. One possibility involves its conceptualisation of hegemony. While Luce (2011, 2015) works with the notion of regional hegemony in the category of sub-imperialism, offering elements that would function as preconditions for its establishment, he does not explain how the process unfolds nor highlights the role of collective consciousness in the process. Although not specific to MDT, Marini (2013) works with the category of levels of consciousness concerning the role of

intellectuals, paralleling Gramsci's (2000a) work on the subject in Notebook XII, but does not provide a clear framework for the use of these concepts.

Further inquiry could also be directed towards scrutinising MDT literature through the Coxian lens of intersubjective meanings and collective images. Specifically, to interrogate what intersubjective meanings and collective images are developed in MDT to aid in understanding and explaining dependency. And also to contrast Marini's use of levels of consciousness to that in Gramsci, with a second exercise of verifying the applicability of the three moments of the political moment to Marini's and other Latin Americanists' works.

The problematic of counter-hegemony against underdevelopment could also benefit from dialogue. While counter-hegemony in Cox (1981) posits a change in the political mesostructure, his understanding that such a movement would be defined as a transformation from below would translate into an antithetical movement to the capitalist macrostructure, at least from a Marxist *dependentista* perspective. Since capitalism breeds underdevelopment, MDT posits the necessity for a revolution that would upend the exploitative macrostructure. Cox has, however, demonstrated a certain aversion to these calling for a violent break with capitalism, advocating for a 'negotiated restructuring' or a 'historic compromise' (Cox and Jacobson 1977: 364). What is not clear is how Cox would propose to convince the power-yielding of the centre to yield enough to end super-exploitation, considering the control mechanisms they hold.

Some of NCT's propositions of the workings of agency would suit MDT, and the latter's understanding of the system's structures would enrich an understanding not only of the current world order but also for framing questions regarding its transformation. As Cox seems to have been stuck in the mesostructure, his analyses do not allow for much room to question how that level can influence the maintenance or transformation of the macrostructure. This dialogue has the potential to enhance IR theorising. Cox's insistence on the balance between the different levels of structure is also an important element in theoretical reflexivity, here understood as a constant questioning of whether the theory being employed maintains its critical theory status. More work, however, is needed, first in grasping each theory's meta-theoretical stances, and second on further developing this bridge. This is, therefore, not meant to exhaust the debate; but rather hopefully instigate its further development.

Notes

- 1 Although NCT cannot be reduced to Cox's perspective and works, it is to these that this manuscript speaks.
- 2 Not to be confused with the denomination applied to the ECLAC school as the structuralist school of development (see Kay 1989, chapter 2 for a more thorough exposition of structuralism).
- 3 This can be understood as virtual (finance) payment transactions or as physical (realisation) of merchandise shipped and sold at prices below its inherent labour value.
- 4 This initial affirmation itself begs for a much more thorough explanation than is given, but let us bracket that concern for a different manuscript.

- 5 To say that they *function* within the political moment is also to suggest an imperfect fit, especially considering that Cox's two elements (forces) are not obviously comparable to a structure itself. Maybe it is a question of apples and oranges versus fruit baskets.
- 6 Germain and Kenny (1998) offer a very rich debate on how neo-Gramscians have engaged with Gramsci within IR. It is of special interest to remark on the controversy they bring on whether Gramsci affords centrality to any level and how the contentious nature of his position within the *Prison Notebooks* is left unremarked and disregarded by many 'new Gramscians.'
- 7 In his 1981 article, Cox speaks of 'social forces' as a sphere of activity. This is extremely problematic as it suggests a conflation of agency and structure, as he also uses the category to refer to the agents of change. In my reading of Cox, he corrects this mistake, as in his later works (1987) he speaks instead of 'social relations of production' to refer to that same sphere of activity.
- 8 This is more obvious in a later book, which Cox (1987: ix) prefaces by stating that the book's 'central premise is that work is a fundamental activity that affects a range of other important human relationships and the organization of society as a whole.' Bieler and Morton (2001) effectively demonstrate how Cox's oeuvre allows for this interpretation.
- 9 There is a discussion within academic circles around the terms of value, surplus-value and surplus and which would be more appropriate when analysing their transfer to core countries. This discussion will not be introduced here, in which case the terms will be used interchangeably.

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Construindo pontes entre a Teoria da Dependência e a Teoria Crítica Neogramsciana: A relação agência-estrutura como ponto de partida

Resumo: Encontrar um terreno comum entre teorias que nunca ou raramente se falaram é um primeiro passo necessário para a construção de pontes, principalmente no que diz respeito às suas bases fundacionais. Este artigo se propõe a desenvolver tal fundamento para um diálogo entre a versão marxista da Teoria da Dependência Latino-Americana (TD) e a Teoria Crítica Neogramsciana (TCN) de Robert Cox. O debate onto-metodológico em torno da relação agência-estrutura oferece um possível ponto de partida para uma discussão sobre (in)compatibilidades, em particular decifrando como cada um entende a relação; mas também perguntando se eles trazem ontologias sociais particulares que precisam ser abordadas.

Palavras-chave: agência-estrutura, Robert Cox, dependência, desenvolvimento e subdesenvolvimento, hegemonia, construção de pontes.

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