



Redes. Revista do Desenvolvimento Regional

ISSN: 1414-7106

ISSN: 1982-6745

revistaredes@unisc.br

Universidade de Santa Cruz do Sul

Brasil

Trucco, Ignacio Tomás; Fernández, Victor Ramiro
Scalarity and periphery. A conceptual reconstruction from the historical-structural point of view
Redes. Revista do Desenvolvimento Regional, vol. 27, 2022, Enero-Diciembre
Universidade de Santa Cruz do Sul
Santa Cruz do Sul, Brasil

DOI: <https://doi.org/10.17058/redes.v27i1.17156>

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Scalarity and periphery. A conceptual reconstruction from the historical-structural point of view

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Abstract

The coexistence of social relations that are defined on different territorial scales and the asymmetric structuring of world space, with central and peripheral positions, constitute two central dimensions of the spatial structuring of socioeconomic systems. Although these two moments were extensively studied, their internal connections are a relatively less explored area. In this framework, the aim of this work is to explore the intrinsic relationships between these moments, constructing a historical-structural interpretation. In order to achieve this objective, the main contributions that focused on the specificity of each moment were analysed, mobilizing different theories about the relationship between society and space. First, the theoretical development of the scalar question is discussed, showing how the relational turn constituted the key theoretical bet of the articulation between the world unity of the capital accumulation process and its spatial structuring on multiple scales. Secondly, the limitations that this option faces are synthesized when the contingency is prioritized as the basis of its conceptual apprehension. Third, a symmetrical criterion is taken to study the theories of dependency and Latin American structuralism, showing how, particularly in the latter case, there are theoretical potentialities to synthesize the scalarity and asymmetric spatial structuring of socioeconomic systems. The work concludes observing that the latter depends on returning to the historical-structural specificity of the peripheral modernization, considering the specific ways in which territoriality and capitalist relations of production are articulated.

Keywords: State. Relationality. Spatiality. Dependence. Modernization.

Escalaridad y periferia. Una reconstrucción conceptual desde un punto de vista histórico-estructural

Resumen

La coexistencia de relaciones sociales que se definen en escalas territoriales diferentes y la estructuración asimétrica del espacio mundial, con posiciones centrales y periféricas, constituyen dos dimensiones centrales de la estructuración espacial de los sistemas socioeconómicos. Si bien estos dos momentos fueron extensamente estudiados, sus conexiones internas resultan un área relativamente menos explorada. En este marco, el trabajo tiene por objetivo explorar las relaciones intrínsecas entre dichos momentos, construyendo para ello una interpretación de carácter histórico-estructural. A fin de alcanzar dicho objetivo, se evalúan las contribuciones principales que se centraron en la especificidad de cada momento, movilizando diferentes teorías sobre la relación entre sociedad y espacio. En primer lugar, se analiza el desarrollo teórico de la cuestión escalar, mostrando cómo el giro relacional constituyó la apuesta teórica clave de la articulación entre la unidad mundial del proceso de acumulación de capital y su estructuración espacial en múltiples escalas. En segundo lugar, se sintetizan las limitaciones que esta opción enfrenta al jerarquizarse la contingencia como fundamento de su aprehensión conceptual. En tercer lugar, se tomó un criterio simétrico para estudiar las teorías de la dependencia y estructuralismo latinoamericano, mostrando cómo, particularmente en este último caso, anidan potencialidades teóricas para sintetizar la escalaridad y la estructuración espacial asimétrica de los sistemas socioeconómicos. El trabajo concluye, observando que esto último depende de volver sobre la especificidad histórico-estructural de la modernización periférica considerando las formas específicas en las que la territorialidad y las relaciones capitalistas de producción se articulan.

Palabras clave: Estado. Relacionalidad. Espacialidad. Dependencia. Modernización.

Escalaridade e periferia. Uma reconstrução conceitual do ponto de vista histórico-estrutural

Resumo

A coexistência de relações sociais que se definem em diferentes escalas territoriais e a estruturação assimétrica do espaço mundial, com posições centrais e periféricas, constituem duas dimensões centrais da estruturação espacial dos sistemas socioeconômicos. Embora esses dois momentos tenham sido amplamente estudados, suas conexões internas são uma área relativamente menos explorada. Nesse quadro, o trabalho visa explorar as relações intrínsecas entre esses momentos, construindo uma interpretação de cunho histórico-estrutural. Para atingir este objetivo, são avaliadas as principais contribuições que incidiram na especificidade de cada momento, mobilizando diferentes teorias sobre a relação entre a sociedade e o espaço. Em primeiro lugar, analisa-se o desenvolvimento teórico da questão escalar, mostrando como a virada relacional constituiu a aposta teórica chave da articulação entre a unidade mundial do processo de acumulação de capital e sua estruturação espacial em múltiplas escalas. Em segundo lugar, as limitações que esta opção enfrenta são sintetizadas observando a contingência como base de sua apreensão conceitual. Terceiro, adotou-se um critério simétrico para estudar as teorias da dependência e do estruturalismo latino-americano, mostrando como, particularmente neste último caso, potencialidades teóricas se aninham para sintetizar a escalaridade e a estruturação espacial assimétrica dos sistemas socioeconômicos. O trabalho conclui, observando que este último depende do retorno à especificidade histórico-estrutural da modernização periférica, considerando as formas específicas de articulação da territorialidade e das relações capitalistas de produção.

Palavras-chave: Estado. Relacionalidade. Espacialidade. Dependência. Modernização

1 Introduction

There are two issues which characterize the studies on the spatiality of the socioeconomic systems: on the one hand, the coexistence of social relations which are defined in different territory scales; on the other hand, the asymmetrical structuring of the global space between different systems, which take up central and peripheral positions.

These two approaches, widely studied in the specialized literature, have not been analysed equally thoroughly from their inner connections, though. In fact, it is not difficult to see the close connection between both approaches - if the scales question how the different social relations structure an economic system with different spatiality, conversely, in the second case, the question is defined according to how the economic systems establish relations which structure the global space with centralities and peripheries.

This work will try to show that it is a social and historical process in which both issues are defined simultaneously and acquire more intelligibility when they are analysed in an integrated way, emphasizing the relations which interconnect them.

In the light of this issue, the present work is divided into three parts. Firstly, another reading of the problem of the scales is carried out through an analysis of the different paths taken at the moment of conceptualizing the tension between two extremes: the world unit of accumulation of capital and its spatial fragmentation (national/regional/local). The second part tries to show how the difficulties to capture the asymmetrical structuring of the global system are symmetrical with the difficulties observed in the scalar analysis. Finally, in the third part, this work moves towards the analysis of Latin American structuralism. In this case, we try to show how this approach seeks an interpretation of the peripheral condition (or, in fact, the global system of asymmetrical relations itself) based on the articulation of different social relations with specific historical attributes. This work concludes by suggesting a group of hypothesis which try to introduce, within the framework of this approach, the scalar dimension with the objective of showing a path of possible theoretical questions.

2 The problem of the scales: history and relationality

The debate over the territory scales which are involved in the structure of the economic systems could be defined via the coexistence and simultaneity of, at least, three relations which evoke different territoriality: the world unity of the capitalist accumulation process, the territory division or delimitation into states-sovereign nations, the city as the area for daily life typical of the human being's gregarious nature.

Apart from the intermediate instances which could be imagined, the former will constitute unavoidable moments to address the spatiality of modern life, as the articulation among them is probably the most enigmatic conceptual aspect and from which the scaling debate emerges.

So as to make the first reference, Marston, Jones and Woodward (2005, p. 417) considered the article by Peter Taylor (1982) as 'foundational'. Although it is

true that the article adopts the expression of ‘political economy of the scale’ (probably making reference to Baran’s work, *The political economy of growth* -1957-, which we will resume in the next section), it is important to take into account the theoretical context in which this work is framed.

Specifically, Taylor (1982) identifies three scales of capitalist spatiality: the global scale, which would constitute ‘the real’ dimension, as a last resort at least, in which the ‘laws’ of capitalist accumulation rule together with the world system and two scales with relative autonomy. Firstly, the scale of the national state, which is the area of ideological apparatus (state-national), and the local-urban scale, which is the area of experience itself.

Clearly, this conjugation did not develop out of nowhere, but rather from two theoretical paths which are produced together in the heart of critical Marxism and neo-Marxism. On the one hand, the territorial specificity of national capitalisms in the Marxist debate over the relative autonomy of state apparatus. Taylor summarizes the debate (1982, pp. 18-19) and distinguishes nationalism as the ideological structure of those apparatus. And, on the other hand, the idea that the city is a space where the accumulation of capital is conditioned by multiple differentiations which are typical of urban life and exceed the strict opposition between capital and work. *The urban question* (1974) by Castells and *Social justice and the city* by Harvey constitute the two main reference works for the author.

These studies (the rise of monopolist capital, the variety of state-national structures, and the social differentiations which intervene in urban life) come together under the observation of social differentiations which, simultaneously, are not symmetrical in their distinction between capital and work and, at the same time, are defined with a territoriality which is different from the intrinsic totality of capitalist relations of production.

Two years later, Neil Smith published *Uneven Development* [1984] (2010), a piece of work in which the scaling problem within the framework of a general theory of unequal and combined development is analysed. Smith’s thought could be analysed by distinguishing three theoretical moments.

Firstly, he assumes the general idea that society is developed according to a dialectic logic of unity and differentiation. Society would tend towards uniformity, but, according to Smith, that same tendency would require differences that would later lead towards new processes of unity thus restarting the mechanism.

Secondly, this dialectic is the result of the overlapping of two ontological moments which are not necessarily reconciled. On the one hand, the capitalist relation of production tends to integrate the whole world into the subsumption of the use value to the change value, incorporating the differences into the homogeneity of trade, but it generates an undeniable differentiation between paid work and capital in the process. Also, the rise of *the difference* as an ontological reality in itself, that is to say, as a multiplicity of sociocultural differentiations (or socially built - MARSTON, 2000-) which constitute an open and conceivable space, which has a functional relation but it is ambiguous when faced with the unfolding of the temporal space of capitalist relations of production.

Finally, and based on the previous assumptions, Smith develops a scaling structure which is similar to Taylor’s, that is to say, distinguishing three scales: local, global and national, although in this case, they would be the result of an oblique

combination of alternative differentiations. Mainly, in a global scale, ‘the universal tendency of the relation work-pay’ (SMITH 2010, p. 187) rentier relations developed from land tenure are found at the base of the local scale. Meanwhile, the national-state scale will remain fairly reduced in its theoretical importance, reduced to the executive branch of the competence among capitalists in the global market (SMITH, 2010, p. 189).

It is possible to identify a characteristic in common between Taylor and Smith's interpretations of the scales problem. In both cases, they are defined by a distortion of the generically global differentiation which is inherent to capitalist relations of production. This distortion works as a force field on other grounds and with (relative) autonomy regarding what ultimately its real dimension is.

Although the scales were defined from a torsion and fragmentation of the social and geographical area of *capital*, it is possible to recognize a series of authors who come from the political geography and are also going to define the scales, but in this case, because of a torsion and fragmentation of the social and geographical space of the state-nation, they will do it in an opposite way to the previous perspective.

For example, in John Agnew's work called ‘Territorial trap’ (1994) he explains the futility of considering the nation-state as a homogeneous unity which contains territoriality or even the whole of the territoriality. Especially in a world which is marked by the ‘velocity and volatility’ (AGNEW, 1994, p. 55) of economic relations that go beyond the ‘state territorial boundaries’ (AGNEW, 1994, p. 55), which could be interpreted as nation-states with sovereign economic institutions.

Kevin Cox notices the same theoretical inadequacy and proposes a constructivist approach of the political geography based on the distinction of areas of dependency and areas of commitment, joined with the networks language, the most ‘appropriate metaphor for the spatiality of scale’ (COX, 1998, p. 2).

Or in Saskia Sassen's work *Losing Control? Sovereignty in an Age of Globalization* (SASSEN, 1996) which also adds a series of studies that break down the homogeneous unity of the sovereign nation state into territorialities which overflow it and which are oriented by relational distances that compose new figures and scaling metaphors.

These two polarities, that is to say, the torsion between the intrinsically global capitalist relations of production and the *deconstruction* of the sovereign nation state, could be interpreted as two mirrored movements that give a glimpse of a tension and, at the same time, a convergence between them both.

In this sense, it is possible to distinguish a third theoretical component which, precisely, will give way to both torsions of social space of the capital and the nation state. The spatial shift of social sciences and the relational shift of the human geography will constitute a double movement that will fold on itself, and which Derek Gregory and John Urry joined together in 1985 in a critical study over society as a space of relations and its base material, that is to say, as the area for these relations. Gregory and Urry identify a key idea: that geographical determinism is, simply, an impossibility, that society mediates in any spatial configuration and the link between both instances is subject to the unavoidable contingency.

This is the other side of the coin of the ontological reconstruction based on *the difference* ('distanciation' in Giddens -1981 y 1984-; or 'distinction' in Bourdieu -1979-), which would constitute the *last ratio* of the relational-generic social.

In this model the social relations space and the geographical space are dramatically different, giving way to the issue of the intelligibility of its articulation. Andrew Sayer had already observed this difficulty and marked the need to take a critical yet realistic path based on the observation guided by an analytical distance (SAYER,1985). The actor-network theory will finally achieve this breaking point by establishing the network as the last (both more abstract and more complex) spatial metaphor of social action structuring (LATOUR, 1996), ubiquitous before the geographical reality and which will only have significance within the framework of the network structuring. The link between both split worlds will be contingent (SAYER 1992; PAASI,1991).

The relational 'opening' of the human geography object represented by authors such as Doreen Massey (1994) or Eduard Soja (1989) had a great influence, especially at the beginning of the decade of 1990, showing a growing distance regarding hypothesis based on historical specificity.

As can be seen, scalarity led to an unavoidable reconsideration of social relations which, in a way, gave (historical) specificity to the scalar structure of the social space: the world unity of capital, statehood and its territory definition, the urban community as a long term historical social subject, and even the problematization of the domestic unit as the structure of specific relations which join this wide scalarity. Summarizing, the tension between both moments (relationality and history) will mark the pace of the scaling debate. This tension emerged quickly and it was stated by Neil Smith in the epilogue of the second edition of *Uneven Development* in 1990.

By the end of the decade of 1990 and beginnings of 2000 the scaling problem already had a growing formulation stated through the uses of the actor-network theory. Two cases of relational formulation by Howitt (1998) could be mentioned, or those which are based on relations of generic power (ALLEN,1997; SWYNGEDOUW, 1997) and are thought to perceive the complexity in itself over the base of an infinite plurality of morphologies that constitute the analytical frame for the scaling analysis. The idea that the accumulation of relations allows 'skipping scales' or identification of emerging properties in complex systems led to the assimilation of the notion of scale in the fractal figure (LAM,2004).

This interpretation will be integrated by Marston (2000) by re-editing Smith's conceptual dual structure and according to whom the scale is, generically, a social construction (that is to say, relational) and it is specified when, later, specific relations come into action: capital, work, the state, but also family and gender relations. The idea of a 'flat ontology', which was developed by Marston, Jones and Woodward (2005), was proposed as an attempt to overcome the opposition of horizontal and verticality, and this model is suggested in the same terms in a later updating work by Jones, Leitner, Marston y Sheppard (2017).

Marston and Smith's perspective caused controversy as opposed to Neil Brenner, who, conversely, insisted on the importance of state relations (or statehood) as a social reality from where scaling structures emerge, especially appealing to Henri Lefebvre 's ideas in *De l'Etat*(1978).

Briefly, Brenner's perspective states the hypothesis of 'retreat of state' as a way to explain the rise of globalization and the growing strategic importance of global financial cities (BRENNER,2003, 2004). On the other hand, the author (BRENNER,1997) highlighted from the very beginning the need to reconsider the re-scaling and denationalization of the state relation as a way of conceptualising globalisation.

However, the most precise definition to understand the state, its possible scaling morphologies and its specific articulation with capitalist relations of production will sink in some years later, and will incorporate the theoretical contributions Bob Jessop developed over decades regarding the state nature in the capitalist society and its 'relational strategic' definition (JESSOP,2007).

Jessop's point of view will lay the foundations for a combined approach in which both extremes (capital and state) coexist according to the relative autonomy of the latter regarding the former. Then, relations or mediations between both extremes will find their conceptualization in the distance of the relational approach, which will not be neutral at all as it will result in a rather functional definition of state, subordinated to the accidental conditions in which classes struggle (JESSOP,2014, p. 25).

The network of complex relations extends the power of the state (capacity to influence agency relations) beyond the strict institutional limit, which only works through the particular actors that compose it. Nevertheless, the complexity of the state itself and the unfolding of the state power will allow the structuring of an almost orthogonal area to the capital dialectic, allowing a relative autonomy that even under some circumstances could both enable and obstruct the capitalist accumulation process.

In Jessop, Jones and Brenner's (2008) summary the scaling structure would be the result of the capitalist relations of production and the state apparatus as the institutional nucleus embedded in the relational weave. The scalarity would constitute one of the four analytical moments identified by the authors: "territories (T), places (P), scales (S), and networks (N)" (JESSOP, JONES & BRENNER, 2008, p.393). *Territoriality* is defined by the dynamic of the construction of 'borders'; *place* is related to the social proximity spaces and which are internally differentiated; the *scales* are a reference to the vertical and domination structures; and the *networks*, as reticular relational spaces, are organised in node and rhizomatic structures.

Within this framework it is possible to observe how the historical structuring attributes of the state fade as the relational approach is used to explain its relative autonomy and, at the same time, the determination eventually moves away, that is to say, the capitalist relations of production.

In comparison to the previous case and from the point of view of the political geography, Allen and Cochrane (2010) vastly used the language of the relational approach so as to rebuild the rescaling of the state and the territory assembling in which the state power concentrates (following Saskia Sassen's categories-2008-). According to these authors, scalarity could be confusing as it refers to the idea that certain fields are 'over' others and, in fact, the differentiation is seen in the reach of networks and places. Again in this case, as the relational language allows grasping the assembly that goes beyond the limits of the state

nation, the historical specificity loses relevance before the network autonomy and its contingent content.

3 The limits of the scaling thought and its centre-periphery relation

As seen in the previous section, the use of relational language led to a new tension between the historical specificity of structuring relations and the contingent content with which the relational space identifies. In order to be able to define it, the scaling problem had to go through determination and contingency simultaneously.

Many researchers were aware of this difficulty and warned of the need to approach it directly. Cox (2013), for instance, highlights the importance of stating the specificity of capitalist relations so as to avoid the whole contingency. Elden (2010), on the other hand, remarks the weakness of stopping before the relativization proposed by Agnew in the territory trap, and emphasizes the need to conceive the historical principles which produce the dynamic between statehood and territoriality. Brenner y Elden (2009) deeply explored the idea that the theory of state and territoriality by Henri Lefebvre on the 'state production form' (BRENNER Y ELDEN, 2009, p. 359) could constitute a good starting point to approach this key question.

By recognising the tension between these authors, it becomes clear that the ample field of concrete social life cannot develop in the extremes, that is to say, in the pure contingency of the relational system or in the pure determination of the capitalist exploitation. It is precisely in the articulation between both moments where real life develops. However, when capturing the specificity of this articulation, the approach weakens by prioritizing the contingency over the historical specificity.

As an example, let us consider the case in which it is assumed that capitalist relations of production are the base or scaffolding. It is the reticular or topological complexity the one which turns into the base for instruments that stabilize, contain, fix or limit the pure capitalist exploitation. The historical specificity of both the state and the city is subordinated to the contingent specificity which characterizes the content of the relational reality.

If this idea is plausible, it is worth wondering whether a third and symmetrical blind spot emerges: the spatial structuring of the world system, that is to say, the (asymmetrical) relations between different socio-economical systems.

Neil Smith was aware of the close relation between the comprehension of the scaling structure and the differentiation on a global scale (SMITH, 2010, p. 180). Smith clearly remarks that the formation of spatial distinctions in the global system, that is to say, differentiated and hierarchic positions, is not the result of a simple tasks distribution, but rather the result of a scaling articulation of unequal capitalism. He takes as an example Samir Amin's characterization, which identifies the centre as the capital goods production space and mass consumption, and the periphery as the raw material production space and luxury consumption (SMITH, 2010, p. 152). Smith states that the reasons for this distinction can only be understood through the way in which certain social relations spread and produce unity and differentiation. The difference will arise from the dialectic between this tendency towards 'equalization', which is inherent to the capitalist accumulation,

and the tendency towards inequalization, which is produced by the combination of pre-capitalist relations of production. The *distinction* as a generic logic of socialization and the *combination* as a formula allow Smith to join the scalarity and the spatial structure of the world system.

However, this case is symmetrical to the one previously analysed. Therefore, the traditional, the monopoly, the bureaucratic or any other relation that is different from the formal equalization dialectic (within circulation) and the real differentiation (within the sphere of production), characteristic of capital, is a window to an infinity of relational configurations, which enables the contingency analysis.

This same consideration could be applied to the theory of dependency and its direct antecedents, monopoly and imperialism. In Paul Baran's (1957) preliminary work we can find key arguments that spin around the ontological excision between the objectivity of capitalist relations of production and, on the other hand, the opening associated with relations of power based on an unconditioned, feudal, monopolistic, state will.

The roots of the delay (and the growth) find in Baran an explicit 'political, cultural and religious' background that, however, is not especially theorized beyond the simple opposition between capitalist relations of production and feudal relations. Ultimately, there is an explanation surrounding Baran's work according to which the expansion of capitalist relations of production in delayed countries would not have broken old feudal relations but rather relied on them so as to maximize the double exploitation (feudal and capitalist) of resources and work strength feeding one-sided transfers to advanced countries and therefore generating 'capitalism without the accumulation of capital' (BARAN, 1957, p. 202).

The theory of dependency fed on this dualism and earned itself permanent criticism by the Marxists closer to Marx's own writing and who criticized having distorted the 'law of value' to explain the transfers of value from the periphery to the centre. Astarita summarised Marxist criticism to the independent thought by focusing on one of the points which this work highlights (ASTARITA, 2019).

Capitalism of free concurrency where the price of goods impersonally surrounds a certain value that is determined by the work containing them must coexist with relations where the monopolies' will and their alliance with the corresponding imperialist states are imposed (CARRERA, 2008, p. 39).

However, sooner or later there comes a need to curb or break the world unity of the accumulation of capital process. Iñigo Carrera, for instance, appeals to the 'specific national form of accumulation of capital' as defined by the imposition of 'appropriators of capital gain, particularly, creditors who are external to the national state and in unfair conditions, and capital from the industrial area and of a foreign origin who operate in the country with scales limited to the size of the inner market (CARRERA, 2018, p. 60). Institutes which can again impose their will over the law of value.

In any case the variety of existing social formations appears to be the result of superstructures supported by a base that does not fully match them. This mismatch can receive many names but it will, in any case, express the conjunction between determination and emptiness or need and contingency, thereby exposing the impossibility of giving intelligibility to the social reality which overflows the

capitalist relations of production. It is something like the dark matter of the political economy.

Palma critically summarized Marxist and dependence research on the underdeveloped economies highlighting the idea this work proposes. According to this author, the key to 'the methodology that needs to be taken' can be found in Lenin's work, building a 'summary of the general determiners of the international capitalist system (external factors) and specific determiners in each case (internal factors)' (PALMA, 1987, p. 43). After analysing the different imperialist or dependent modalities, Palma recognizes that the peculiarity with which capitalist relations of production articulate with the periphery pre-capitalist specificity results in uncertain possibilities of development for those who have broken out of the colonization chains. He even attempts to find (as can be seen in the following section) the key towards an interpretation of a dialectic of dependency based on the characterization of the concrete situation.

As the commercial-capitalist form of wealth constitutes the base for historicity so that the scaling fragmentation finds its origin in an internal factor that is not conditioned and contingent, the formation of a particular socio-economic system and its structuring relation with other socio-economic systems will also split this irresolvable duality.

Finally, although Jessop's strategic relational approach (neo-Marxist based) proposes extending the analysis framework and developing a language based on the institutional complexity of the relative autonomy of state apparatus, it will end up having a similar fate.

Before the simple opposition between independence and dependence of particular states, Jessop describes the world through 'semantic, institutional and spatial-temporal agreements which could guarantee for some time the necessary contingent conditions for a differential accumulation that is relatively stable on a global scale' (JESSOP, 2017). According to Jessop's perspective, the 'hyper-complexity' of this articulation gives way to a wide variety of possibilities, a 'variegated capitalism with a provisional emergent logic' (JESSOP, 2017). This means that, between the strategic relationality and the capital determination, a wide network of contingencies spreads and can allow degrees of freedom or unpredictable situations in central or peripheral countries.

Jessop's variegated capitalism opposes the varieties of capitalism (summarized in HALL & SOSKICE, 2001) and tries not to lose sight of the specificity of capitalist relations of production, unlike the latter which, according to the author, would tend to 'fetish the models or national differentiations' (JESSOP, 2017). Like the relative autonomy of the state though, the problem persists as the central/peripheral position keeps a fundamental contingency.

As can be seen, the symmetry between both issues is direct. Approaching both the scaling structure and the asymmetric structure of the world system requires keeping the historical specificity of the social relations that produce differentiation and homogenisation between socio-economic systems and the inside of the socio-economic systems. Conversely, if the state or any other relation intervenes in the structuring of social life, it dissolves in an open and contingent reticular system, and therefore dissolves the possibility of giving intelligibility to the

scaling structure of the production systems and the spatial structuring of the world system. Both must be solved simultaneously.

4 Scaling restructuring of the periphery: re-evaluation of the Latin American structuralism

Henceforth it is possible to reconsider certain contributions of the Latin American structuralism which have sought to conceptualize the peripheral insertion of Latin America.

Palma recognizes in Fernando Enrique Cardoso's approach (especially in his work together with Enzo Faletto, *Dependency and development in Latin America* [1969] -2007-) a path to address the peripheral condition, which will join the central hypothesis of the structuralist thought, though it is not particularly highlighted by Palma.

Palma's reading criteria will rely on the research praxis based on the approach of a 'particular and concrete situation' in which the identification of specific insertion conditions of a socio-economic space in the global economy is sought, therefore addressing the 'dialectic unit' or 'summary' of the 'internal and external factors' (PALMA, 1987, p. 73).

Prebisch himself will adopt a similar objective to analyse peripheral capitalism: 'It is necessary to reach a global theory which integrates all the elements of the world system of capitalism. Peripheral capitalism is part of this world system but it has its own specificity' (PREBISCH, 1981, p. 31).

Addressing this specificity will necessarily mean defining modalities of articulation between different relations, both internal (individuals, classes and the state) and external (general tendencies of the capitalist system). Nevertheless, approaching this 'dialectic unit' does not reduce the risk of going back to a contingent substantiation of the approach nor ensures an explicit conceptualization of the scaling articulation of the periphery.

In a way Cardoso and Faletto were aware of the risk involving the predominance of contingency as a principle of interpretation of social reality, to which they opposed the need for a holistic solution focused on the social signification of the action within a general historical process (CARDOSO & FALETTTO, 2007, p. 17-18).

Similarly, it can be seen in the conceptualization of the 'historical process' mentioned by Celso Furtado in *Development dialectic* (1965). According to this author the notion of system is not enough to conceptualise the process of development and underdevelopment. The system as a set, union or group of juxtaposed relations cannot be simply assimilated to the idea of historical totality which is, in fact, defined giving signification to the social action (FURTADO, 1965, p. 30-31).

Once the point of view is defined, it is possible to wonder: What is the historical principle which allows the interpretation of the articulation of different social relations? And to what extent does it allow to understand the scaling articulation and the asymmetrical positions in the world system?

All the aforementioned authors, Cardoso and Faletto, Furtado and Prebisch, will show similarities regarding the characteristic attributes of the peripheral

condition: heterogeneity and productive specialization, technological delay, elites with consumption patterns which weaken the process of capital accumulation, fragility of state structures, structural unemployment and weakness of the working class, frequent crisis in the balance of payment, among other more or less noticeable traits. However, the authors were less able to specify the historical structural principle which would allow understanding which social relations can, articulating different scales, produce a world system with national subsystems where situations of this kind coexist.

Furtado's answer is probably the simplest and most assertive, a 'truly heroic simplification' of the first engine that gives way to the cultural and dialectic process of social transformation: 'There exists an agreement that this parameter, which is permanently modified in modern societies, is the technique' (FURTADO, 1965, p. 34).

If modern history is marked by the process of advancement in knowledge and its technological application, setting in motion structures and positions of class, stratum and territory, then, the place where it is limited or cannot be incorporated would produce the formation of dual societies, that is to say, peripheral or underdeveloped.

Conversely, as previously stated, if the historical is defined according to the significations that give sense to the action within the framework of human relations, then the technical change itself could not be defined as a principle of historicity. The instrumental manipulation of nature would be the result of a way of understanding the world, the result of a way of converting nature into a strict object of study and manipulation so as to merely satisfy immediate human needs (curiosity, comfort and life expectancy, for instance).

Anyway, Furtado should first answer what cultural significances serve as a frame to the social process in which nature receives an instrumental significance. Only within that framework will it make sense to think of social configurations that cannot assimilate the technological change and therefore produce dual social formations.

This same consideration was addressed by Cardoso and Faletto over the demonstration effect of consumption in the periphery and its function in the modernization process. The ways of consumption of the different classes are again the result and not the principle of explanation of the social process of development.

According to the authors, the global and generic commercial relation develops an 'ambiguous situation' regarding the 'national interests' which are formed in the process of territory sedimentation of political and economic relations which try to establish a 'legitimate political order' (CARDOSO & FALETTO, 2007, 28). When these social realities meet, there comes the possibility of infinite possible articulation of classes in the national and global space, which would allow describing the 'domination mechanisms', 'analytic-causal' of the peripheral condition.

Conversely, it is clear that at this point there arises contingency as a principle of apprehension of the articulation between the totality of the business relations and capitalist exploitation under national conditions. The historical tries to persist over the base in which dependency is the result of a particular form of combination

between the modern and the traditional, an idea that constantly surrounds these authors' work.

Dependency and development could even be interpreted as a general evaluation of the conditions in which *modernising* classes can prevail over, or articulate with, *traditional* fractions to compose a path based on the accumulation of wealth and technological change, or a path of underdevelopment and dependency. In spite of this, it must be noted that at no time can the modern and the traditional clearly be defined and, at the very least, these principles must adhere to the treatment given by other authors (especially by Gino Germani), being only aware that it would be a mistake to identify development with modernization and tradition with underdevelopment (CARDOSO & FALETTO, 2007, p. 11).

Studied as a whole, the work suggests that specific articulation forms of modern and traditional socio-economic fractions in a national space could explain development pathways, which constitutes a more general and suggestive intuition than the simple identification centre = modern = development / periphery = tradition = underdevelopment. The idea that they are specific articulations between the modern and the traditional and not just the prevalence of the modern, which favours the accumulation process and the technological assimilation, allows improving the characterization of the development process not only in Latin America, but also in the European centre and even the development experiences in Asia.

This particular advancement though reaches a limit regarding the lack of a clear definition of the modern, both as the principle of historicity and the strict exteriority where traditional relations are found. Consequently, the contingency advances again and is prioritized as a principle of comprehension.

This issue is directly linked to the scaling issue within the framework of the structuralist thought. Not being able to clarify the historical structural process that results in periphery also limited the possibilities of conceptualizing the scalarity of the development process itself beyond the stylized characterization of the peripheral condition.

To summarize, it is possible to observe a structuralist intuition over the articulation of different historically specific social relations, which can articulate different scales and produce centres and peripheries in the world system. However, within the inner structuralist perspective it was not possible to develop an explicit theoretical elaboration of the scaling and spatial structure and its interrelations under the capitalist dynamic and its transformations.

Once this is accepted, it is possible to introduce a group of proposals that, because of length reasons cannot be deeply developed, but can be established as initial premises so as to reconsider structuralist thesis. In this sense, the objective is to deepen both into the historicity as a starting point and into a conceptualization together with the scalarity and the asymmetrical structuring of the world system.

This requires, firstly, abandoning the idea that the state derives its reality from a social relation that is different or exterior to it. Regardless of its possible relative economy, if the state finds its reality and rationale in a strange social relation, it can only lose its historical specificity in the contingency.

Consequently, if the real world objectifies in territory states which ubiquitously assist people's institution of life in different scales (from the national

sovereignty to the local unit), the state must be defined in the same way as capital, as a properly modern social relation. In it intelligibility must be given to its phenomenal display, the development of its contradictions or internal differentiations and, especially, to the way in which it articulates or combines with other relations.

So that the state, like the capital, can be defined as social forms of this time though, the modern cannot be reduced and identified with any of these particular relations. Conversely, it should include them as a primary principle of historicity where they reflect and specify.

If, for instance, we support a Weber-inspired definition of modernity as a time in which ‘the magic enchantment of the world has broken down’ (Weber 1942[1923], 200) so that any authority, state or civil, private or public, cannot be founded on a magic or religious transcendent order, then both state and capital could be thought as two specific forms of *secular* authority. Weber himself deeply explores these two relations, showing the ‘rational prophecies’ on which they are based (the rational enterprise and the rational bureaucracy), the way in which they both involve ‘the irrational’ or ‘the traditional’, the stratifications or differences that are able to produce and the implications that they keep between them in concrete modalities.

It is neither possible nor necessary to develop these ideas here, but it will be enough to recognise some general necessary traits so as to enrich the aforementioned structuralist hypothesis.

Therefore, capitalist relations can be thought as those authority relations that are based on the private property of the production means and whose foundation is the formal equality of the contracting party. From them there arises the distinction between those who plan the production process and those who are planned by it. Thus tendencies of concentration and centralization of production means could be defined, favouring the formation of bourgeois elites which are strengthened over time on the basis of heritage and the formation of class membership networks that overcome borders and cultures.

On the other hand, state relations would be those authority relations that are based on people’s identification and belonging to a defined territorial community and explicitly stated in a constitutional affirmation. These authority forms are developed around the monopoly of 1) legal violence (physical, fiscal, financial and lawful violence before constitutional infringements) and 2) representative practice (monopoly of the unity symbols of the state).

These instances which are the institutional reality of the sovereign state bring about status inequality in the political community and create conflict with the formal equality of citizens before the law. In this case, control relations are based on state elites (bureaucratic, military, police, judicial and even religious) which are specialised in the coordination of actions at community-scale, strategic planning, war technique and police control practice, the coding of customs raised to law level or the formation of transversal educational systems. This specific domination tends to remain before disintegrating tensions through the same paths as the previous case, heritage and personal, family and status membership networks.

It is currently difficult to ignore the ample evidence that shows how in modern history these two social relations develop together, complementary and

contradictory. In the formation of the European capitalism noble-landowner-bureaucratic-military elites and the commercial and financial and later industrial bourgeoisie, both in the rural and urban area, were directly linked to one another conflictingly.

From different theoretical bases, Polanyi (1947) showed that the market empowerment necessarily required the formation of national markets limited and controlled by the state. Arrighi (1999), who followed Max Weber, among others, developed the idea of a historical dialectic (requirements of the opposite) between the state and the capital to show the tension and complementarity between these elites in the formation of modern capitalisms. War, competition, negotiation and coalition between the state elites favoured the development and concentration of foreign trade and finances and the formation of a luxury goods market which allowed bourgeois elites to mediate in the relations of the noble social class (SOMBART, [1913]2000). The post was the origin of national monetary systems together with tax systems, which gave way to the possibility of financing autonomous expenses that gave dynamism and formed the necessary scaffolding to the growing economic activity of the rising bourgeois elite.

The articulation of the state form (which is scalarly defined on the base of a territory definition creating the unity of a political community) and the capital form (which is scalarly defined on the base of a global unity of the accumulation process) would define the principle of interpretation of specificity in each subsystem and the way it integrates to the global economy.

Hence it is possible to wonder what specific articulations could have developed in such a way that they limited the process of capital accumulation and the absorption of technological progress, therefore producing dual social and peripheral formations.

In this case, the peripheral condition would not be an incomplete or even combined modernity, but rather a specific formation and articulation of the state and capital forms. Summarising, it could be said that the hypothesis where state and capitalist elites, in the peripheral case, could not be characterised according to the differentiation, the complementarity and the conflict, but rather according to the overlapping, the confusion or the identification between both, therefore producing certain malfunction in relation to the progressive imperatives which characterise elites from central countries: capital accumulation on the one hand, strategic skill on the other hand and, together, absorption of the technological change.

By following this hypothesis, the monopoly of planning in the surplus formation coincides with the monopoly of violence and representation. By considering this particular articulation it is possible to foresee some consequences. On the one hand, the social structure is simplified and the differences with the inferior sectors are more deeply marked. The bourgeoisie loses its commoner character and acquires characteristics of the military bureaucratic elite, maximizes luxury goods consumption, increases the importance of income in the national income and moves the valorization of its assets towards the circuits of central countries, where they meet and integrate central, bourgeois or state elites.

Because of their military-bureaucratic function, the peripheral elites lose functionality as the strategic coordination capacity, low quality in its specialised

bureaucracy, weaknesses in the tax systems and the lack of structural legitimacy in the public expenditure would be frequent. Military-bureaucratic elites which are permanently suspected of having 'bought' or 'plundered' the status position lose (in fact, never really acquire) the noble halo that works as a foundational myth of distinction. This particular embodiment of the executive branch of the state is degraded by the 'vile metal' and it is added/overlapped to the particular form of the economic and capitalist elite, showing a pattern of articulation typical of peripheral economies and, especially, those where the concentration of property (or natural resources) has been higher.

In this kind of formations the depth of the separation between elites and the lower sectors could be interpreted as proportional to the degree of confusion between bourgeois and state elites, with quite paradoxical results. The unity of the political territorial community will always be hurt, the centrifuged strengths overstimulated, the distributive fight (in case it begins) will probably be stronger than in the centres as the elites will be open to tolerate levels significantly lower in the participation of lower sectors in the national income and the use of currency. Within this context, it is expected that private and public investment projects have a lower temporariness and a higher projected profitability than in the centre, and the strategic coordination between the state and the capital is affected not by the difference and the conflict, but rather by the identification between both modalities of the elites.

This way of approaching the peripheral condition is based on a quite direct dialogue between the Latin American structuralism hypothesis and the thesis developed by Arrighi (1999) or Tilly (1992), related to the historical composition of the modern economic systems in Europe. In this case there was only an attempt to show that the peripheral character of a national economic system is the historical result of a far-reaching process structured by different social relations which operate within different scales and are determined together so as to give specificity to each system, even to the world unit of modernization process itself. Periphery and scalarity are, therefore, inseparable elements.

By considering the simplifications made in this section, capital, in its totality, is articulated with the state in its social-historical form, which has the composition of a social-territorial unit that both contains and disciplines internal differentiations. Its moment of scalar expression is seen in the national-sovereign space, where these differentiations are carried out and institutionalised at the same time as they combine and unify. Different sectors, classes and a complex and varied structure of (usually asymmetrical) cities, regions and sub-national states scalarly compose the unity of the sovereign space. It must be added that the social-territorial unity of the statehood can also transcend that explicit border which is always, at some point, arbitrary as the result of strength and coercion relations spread out in the historical composition of that unity. The transnational is projected as a cultural and material unity that can be continental, transcontinental or even civilizing, and it is present in a ghostly manner before a fractional sovereignty, but in a real and concrete manner when, for some reason, it assumes attributes with a sovereign decision limit.

In any case, the articulation of these relations gives structure to the infinite network of links that unifies the globe and constitutes the space of permanent fight for the cultural predominance and the appropriation of the produced surplus.

The characterization of the periphery made in this section emphasizes the ways of articulation of certain social relations, which would give way to territories in weak structural conditions when it comes to inserting themselves in the world area of modernization and technological-productive transformation process. Within this framework, the historical enquiry of the specific causes which formed this particular structuring of the periphery would constitute a method consistent with this perspective. It would be possible, then, to go back to Palma's general idea of studying the 'particular and concrete situation' but not within the limit of the contingent grounds, but rather as the particular product of the spread of properly modern social relations which, in its articulation, produces development phenomena.

The aforementioned simple and a little rough modelling fundamentally constitutes the task of pointing out the importance and plausibility of deepening into the more substantial hypothesis of Latin American structuralism. Especially so as to address the key problems of social sciences in general and economic science in particular like, for instance, the scaling structuring of the modern world and the formation of central and peripheral positions.

To summarise, the proposed stylised traits cannot be considered as definite, but they are rather a first approximation that could be related to a plurality of previous research. Conversely, the objective was to show that the Latin American structuralism thesis, when analysed through the aforementioned approaches, have a differential capacity of realising, simultaneously and without falling into pure contingency, the scaling structuring of the socio-economical systems and the asymmetrical spatial structuring in the world system.

Conclusions

As a summary, the article sought to show how research on the territorial scale is tightly related to research on the spatial structure of the world system and the ways of characterizing the peripheral condition.

Within this context, it was shown how the main answers come together in the overlapping of historical-social polarities (capital and state, for instance) but were not able to construct ways of understanding the articulation between them. It has resorted then to relational models which implied an opening to complexity and emerging properties, but lay on the contingency so as to avoid the subsumption of one polarity over another one.

Thanks to this kind of answers, two effects were produced: on the one hand, the scaling issue tended to separate from the spatial structuring of the world system and, on the other hand, both ended up in an irresolvable tension between determination and contingency.

Next, it was shown how theories of unequal development and dependency show symmetrical traits and how the Latin American structuralist perspective tried to address these questions although facing serious limitations. In particular, structuralists recognised the importance of conceptualizing the historical so as to address the unity of the social process of development and formation of peripheral social systems. But they were not able to elaborate such a social historical principle with clarity and distinction. Similarly, it also hindered the precision of social relations

that operate in the scaling structure of the world system, an aspect which is subordinated to the stylised conditions of the peripheral position.

Finally, the work concludes with an outline of adapted preliminary hypothesis to deepen the structuralist perspective and allows advancing in the conceptualization of the scalarity and the asymmetrical structuring of the world system. A simplified model was proposed with the objective of showing how the peripheral condition can be interpreted as the result of the articulation of different social relations defined in different scales, inherent to the social-historical process of development of the modern world.

Naturally, this type of interpretation does not eliminate the contingency to which social reality is subjected to in the historical path. But it does not constitute the studied principle of interpretation of reality. The particular strategic-relational positions of the different actors and the contingency intrinsic to social reality are not underestimated. Conversely, they are kept, although under a hypothesis over the historical significance of the social relations which give structure and intelligibility to the plural and infinite observable reality.

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Submitted in: 21/11/2021

Approved in: 03/01/2022

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